INCREASING SALES BY MANAGING THE INTERLOCKING CONTINGENCIES BETWEEN SALES REPRESENTATIVES AND CUSTOMERS USING BEHAVIORAL SELF-MONITORING

A Thesis
by
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Abstract

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The interlocking contingencies that exist between a customer and sales representatives may contribute to buying decisions. The purpose of this study is to redesign the sales call verbal process of five sales representatives to shape the verbal behaviors most likely to result in a sale. Using the behaviors found to be statistically significant through a correlational analysis, behaviors related to closing sales were identified by sales representatives in a focus group meeting and were used to develop a self-observation check sheet. After five weeks of self-monitoring, the sales representatives began to receive weekly performance feedback on the targeted behaviors. On average, the six targeted verbal behaviors related to sales increased eight percentage points over baseline compared to a two percentage point increase in the comparison group. While the self-monitoring phase was associated with an average increase of 12 percentage points over baseline, the subsequent performance feedback phase was associated with an average increase of four percentage points over baseline. The greatest behavior change occurred in the behaviors "Contact" (asks for customer's contact information including email address) and "Project" (asks customer

what they are using the building for). The customer verbal behaviors associated with sales were "Phone" (provided phone number) and "Email" (provided email address), which increased 17 percentage points over baseline. These changes were associated with 130% more sales during the intervention period for the experimental group compared with 32% more sales for the comparison group. The interlocking contingencies between certain sales representative verbal behaviors, consisting of "Contact" (asks for customer's contact information including email address) and "Deposit" (states how much of a deposit can get the order started) and certain customer verbal behaviors consisting of "Phone" (provided phone number) and "Want" (did customer say they want to buy a building) seemed to occasion an increase in customer buying behavior. For each sales representative, this increase in sales translates into $1,126,528 more in annualized revenue and $4,989 more in annualized sales commission.

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Foreword

This thesis is written in accordance with the style of the
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Increasing Sales by Managing Interlocking Contingencies Between Sales Representatives and Customers Using Behavioral Self-Monitoring

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Increasing Sales by Managing Interlocking Contingencies Between Sales Representatives and Customers Using Behavioral Self-Monitoring

The spread of emerging technologies such as the internet is allowing businesses to conduct more transactions online and via the phone. Retailers who sell large products such as steel buildings can save money and time by not maintaining large sales staffs to travel and conduct house calls to potential customers or transporting their products to showrooms. Consumers of these products no longer have to search for local companies, schedule sales visits, or travel to showrooms. Instead, retailers can display content and pictures of their products online and use various tools to help potential customers find their website. Once the customer has found the company's website, they can search the website to see if the company's products meet their needs or contact the company for more information.

Both parties face problems with this method of conducting business. Consumers experience a higher degree of uncertainty because they are unable to physically touch and see the product (Pavlou, Huigang, & Yajiong, 2007) while companies must find ways to reach appropriate markets.

Traditionally, companies advertised their products and services through television and radio ads, billboards, and websites to reach their intended market. Many companies have shifted from this method of advertising, known as outbound marketing, to a method referred to as inbound marketing (Pendleton, Lundstrom, & Dixit, 2012). Pendleton et al. define inbound marketing as a strategy using various technologies that help the customer find the company instead of the company "pushing" its products and services on the customer through outbound marketing. These tools include blogs, social media, and search engine marketing.

Today, consumers have a higher degree of control in the amount and types of marketing information they receive with new technologies. Pendleton et al. argue that with the increased use of the internet, customers are becoming more "active" in that they can research products they are interested in and communicate with other potential or existing customers about those products. Companies must rethink their marketing strategy. Inbound marketing allows businesses to take advantage of this shift in customer behavior by competing for highly valued placement of their links on search engines such as Google and presenting information on their products through multiple channels such as social media and blogs. More than half of all site visitors arrived there from search engines (Telang, Rajan, & Mukhopadhyay, 2004), while Google receives over 91 million visitors a day (Mamaghani, 2009). Dou, Lim, Su, Zhou, & Cui (2010) found that not only does the position of a company's link affect the number of visitors to a site, but it also affects brand awareness and brand perception in terms of how well consumers recognized a previously unknown brand.

The company in this study addressed the call for inbound marketing by increasing its marketing budget to gain position in search engine listings. This strategy is known as search engine marketing. Two common methods of utilizing this strategy (Mamaghani, 2009) are through Search Engine Optimization and Pay Per Click. Search Engine Optimization is improving a site's overall ranking when searches are conducted by changing aspects of the site itself while Pay Per Click is bidding on keywords that improve a site's ranking. Better positioning on search engines creates more "traffic" entering the company's websites, thereby exposing the company's products and service to more potential customers. Agarwal, Hosanagar, & Smith (2011) estimated that $9.36 billion was spent worldwide on paid searches in 2008.

Sales Representatives

Many customers choose to call a company when researching products on the internet so that they may ask questions specific to their needs. Sales representatives (SRs) who take these calls can provide value because they are the human link between the company and the customer. Thus, they can optimize the company's investment in inbound marketing through converting the inbound customer into sales and revenue or, through their behavior, lose customers and waste the investment. The present company noticed a substantial increase in exposure to potential customers but only a modest increase in sales.

SRs have many verbal behaviors to not only assist the customer but influence purchase decisions. McFarland, Challagalla, and Shervani (2006) identified six tactics useful in persuading potential customers to make a purchase: information exchange (i.e., communication of information without any specific recommendations); recommendations (i.e., arguments that the company's products will meet the customer's need); threats (i.e., customer will lose some type of benefit if they do not purchase); promises (i.e., seller promises specific reward); ingratiation (i.e., behaviors intended to increase interpersonal attractiveness); and inspirational appeal (i.e., proposal that arouses positive response from the customer). Beyond considerations of product costs and quality, SR verbal behavior can have a substantial impact on sales.

Verbal Behaviors

From an analysis of phone calls between SRs and customers in the present company (detailed in the Results section of this paper), a high degree of variance was observed in verbal behaviors used during the phone conversations. This implies that the host company did not have a defined process to guide verbal behaviors and/or the SRs were not motivated

to perform these behaviors. In order to increase sales, critical verbal behaviors needed to be pinpointed by better understanding these behaviors in the context of the interlocking contingencies between SR behaviors and customer purchasing behaviors.

Skinner (1957) first classified verbal behaviors in the context of behavior analysis. Based on the work of Skinner (1957), Egan and Barnes-Holmes (2011) described verbal behavior in terms of mands and tacts. They describe mands as verbal behavior being controlled by "establishing operations and specific reinforcers" (p.127). Agnew (1998) defines establishing operations as a "motivative variable which establishes the effectiveness of certain stimuli as consequences, and alters the probability of behavior which has been consequated with those stimulus events" (p. 8). Therefore, a mand made by SR managers may be the incentive received by SRs for closing the sale, which reinforces the likelihood of performing key verbal behaviors in the customer interaction. During the customer interaction itself, the SR may use mands such as "act now or you may lose the discount" to create an establishing operation for the customer that may influence their buying decision.

Egan and Barnes-Holmes (2011) describe tacts as controlled by a discriminative stimulus or a generalized reinforcer. For SRs, a tact could be a listing of behaviors that management wants the SRs to perform or the customer asks a question. For the customers, a tact could be SRs asking them a question or answering a question that the customer had.

By understanding these unique contingencies, the verbal process could be redesigned by collaborating with the SRs in a way that would be empirically related to customer purchases. The verbal behavior of SRs could be analyzed for the occurrence of mands and tacts to determine how they individually, or in concert with each other, influence customer

responses and buying decisions within the interlocking contingencies between SR and customer.

Interlocking Contingencies

Daniels and Daniels (2004) explained that every behavior is affected by something that occurs before it (an antecedent) and by what that behavior produces (a consequence). This is known as a three-term contingency or a direct contingency (Hayes, Bunting, Herbst, Bond, & Barnes-Holmes, 2006). The common method of applying Organizational Behavior Management (OBM) is to conduct an analysis of the contingencies that lead to the behavior and then ultimately alter these contingencies to increase performance or decrease unproductive behaviors (Petrock, 1978; Daniels & Daniels, 2004).

Many researchers within the OBM tradition (Bond, Hayes, & Barnes-Holmes, 2006; Hayes et al., 2006; Stewart, Barnes-Holmes, Barnes-Holmes, Bond, & Hayes, 2006) argue that using direct contingencies may not be the most effective way of explaining all behavior. More specifically, Hayes et al. suggest that when examining the behavior of verbal beings, verbal processes may have important effects on the potency of environmental manipulations. The verbal behaviors of SRs influence the environment of customers and, reciprocally, the customers influence the environment of SRs. Thus, this interaction affects the behaviors of both parties, because they are mutually dependent on each other to produce a summative product (Sandaker, 2009), in this case a sale.

As previously suggested, SRs may be able to influence customer decisions through their verbal behavior. Similarly, customers also may influence SR behavior. For instance, if a customer refuses to provide some contact information in response to a request tact from the SR for fear of being harassed by the company in the future, the SRs may become hesitant to

use some of the more influential mands at their disposal. The SR experiencing this consequence suggesting that the mands may not work may then be motivated to get off the phone with the "problem customer" who will not be associated with the ultimate reinforcer of a sale. This interaction represents an interlocking contingency where each person is providing antecedents and consequences to the other in a dynamic setting where these contingencies are constantly being adapted.

There are examples in the OBM literature demonstrating the influence of interlocking contingencies within work settings. Camden and Ludwig (in press) reduced absenteeism among Certified Nursing Assistants by demonstrating the interlocking contingency that existed among them within an absenteeism paradigm. When a nursing assistant was absent from work, another had to work additional hours to maintain staffing in the hospital. This next nursing assistant was then more likely to take a day away from work to make up for the extra work and the cycle continued causing disruptive absenteeism. Camden and Ludwig made nursing assistants aware of this interlocking contingency through normative feedback, which was associated with decreases in missed days. Similarly, Clayton and Mawhinney (1997) modified the interlocking contingencies among managers of two long-term care facilities by decentralizing the management of staff work schedules, thereby decreasing overtime costs.

In order to understand the interlocking contingencies between SRs and customers in the present study, the covariance between the SR and the two's behavior was empirically linked through statistical analyses of verbal behaviors observed in recorded sales calls. After gaining an understanding of these verbal behavior contingencies, a more effective sales call process may be redesigned and evaluated.

Process Redesign

A process is a series of steps designed to produce a product or service or, said another way, to describe what people do (Tosti, 2006). Rummler and Brache (1995) see a process as a value chain whereby each component within the process should add value to the final product. If a process is not adding value to customers, a redesign of the process is needed.

Process redesign aims to establish the most efficient and effective method for accomplishing a particular result. Typically this is done by creating a process map of the existing process in place (i.e., the "is" map) and then redesigning that map with critical changes to create a better process (i.e., the "should" map; Diener, McGee, & Miguel, 2009; Rummler & Brache, 1995). With the end result in mind, each step should add value to the process. By examining each step in a process with the end goal of each adding value to the final product, a more effective process design can be developed.

Behavior Systems Analysis uses, among other things, process mapping as a tool to both understand the systemic contingencies and metacontingencies impacting the behavior of workers and supervisors (Diener, McGee, & Miguel, 2009). The central premise of Behavior Systems Analysis is that the organizational system strongly influences the work processes of the work teams and individuals which, in turn, set up the direct and indirect contingencies governing individual work behavior (Malott, 2003). Thus, in order to create a more long-standing change in work behavior, such as the verbal behavior in sales calls, it may be best to institutionalize an effective work process, but one based on the reality of the natural contingencies of the work process, such as the interlocking contingencies present in the SR and customer interaction (Malott, 2003).

Using Focus Groups to Redesign Processes

Designing a more effective process is best done by using focus groups to obtain information from employees who use the process every day and experience the work contingencies directly. Studies that employed focus groups have found that they are effective in gaining collaboration among participants while designing processes and increasing participation in behavioral interventions.

Ludwig and Geller (1997) found that using a participative method of task identification and goal setting can be just as effective as using assigned tasks and goals when intervening on targeted behaviors. However, they found that only participative methods are effective in generalizing the effects of the intervention to non-targeted behaviors. Furthermore, Olson and Winchester (2008) suggested that when interventions that are time-consuming and require much effort, early employee involvement should be considered. Therefore, focus groups can be effective in gaining participation from those who are closely involved in the process, thereby increasing ownership of the process redesign which increases the likelihood of behavior change (Erez & Arad, 1986), and may generalize to other productive behaviors (Ludwig & Geller, 1997).

Blasingame, Hale, and Ludwig (in press) used process redesign to increase communication effectiveness among welders and their materials runners, decreasing the amount of set-up time required before each weld. Blasingame et al. held a focus group consisting of the welders and used their input to design a process map of how the welding process should be done. Likewise, Gravinese and Ludwig (2007) took feedback from the staff at a nursing home to redesign the process of distributing food to room-bound residents that resulted in substantially reduced call-bell response time. Berglund and Ludwig (2009)

used a group process to redesign the furniture shipping preparation and delivery process among employees at a furniture distribution center. By designing a direct customer feedback via deliverers into the process, they were able to increase customer satisfaction and lower returned items.

Myers, McSween, Medina, Rost, and Alvero (2010) used an "all-hands overview" and safety assessment to gain employee's input on high risk areas and behaviors, and to identify appropriate training methods to develop an improved safety program. They found that as more workers participated in the safety observation process, the number of worker's compensation claims decreased. McSween and Matthews (2001) pointed out the importance of "involving a group of employees in planning and implementing a behavioral safety process". They stated that this involvement increases the employees' "ownership" of the safety process which results in them participating and promoting the safety process (McSween & Matthews, 2001).

Behavior Change

Though having a well-defined, mission-driven process is necessary, it may not be sufficient for obtaining optimized performance and results. SR behaviors must be consistent with a new sales call process.

In the present company, the SRs did not demonstrate fluency in performing key verbal behaviors. Though the SRs had a list of verbal behaviors to perform, this antecedent was not adequate to direct when these behaviors should take place in the context of the interlocking contingencies. Though the SRs were given commission-based incentives for closing sales, they were not given direct reinforcers for performing the behaviors that lead to sales. They needed to learn, for example, what information was required from the customer

to then emit their verbal behavior in order to create a "threat" (McFarland, Challagalla, & Shervani, 2006) to help close a sale.

Therefore, a contingency-specifying statement needed to be reinforced. A contingency-specifying statement is a rule that alters the function of an existing stimulus; this altered stimulus controls a particular behavior (Schlinger & Blakely, 1987). The aim of the present study is to alter the contingency between performing these behaviors, increasing sales, and ultimately increasing the commission of SRs.

SRs may also be reinforced for performing alternative behaviors not useful in getting a sale. SRs may not perform behaviors that receive negative reactions from certain customers because they do not have a clear understanding of the connection between performing those behaviors and closing the sale. Instead, the SRs may engage in less productive "chit chat" to avoid negative reactions. SRs may also be engaging in "superstitious" behaviors (Lobmeyer & Wasserman, 1986) that they think have impact on sales but do not.

In order to increase sales, effective sales behaviors should be clearly defined and shaped to avoid negative reactions from customers. To do this, an understanding of the interlocking contingencies between the SR's and customer's behaviors is a needed antecedent. This behavioral analysis should be based on an empirical evidence of SR-customer interactions and shared with the SRs during the focus group meeting. Once the interlocking behaviors are understood, a process redesign can be developed with SRs to provide a more clear process of sales calls. After designing a definitive process, the SR's behaviors can be shaped using established methods of prompting and feedback using Behavioral Self-Monitoring.

Behavioral Self-Monitoring

Behavioral Self-Monitoring (BSM) has been documented extensively within the behavior analytic literature. Employees observe and record their own behavior frequently in a BSM intervention (Olson & Winchester, 2008). Behaviorally, BSM serves many functions. At its most basic level, the behavioral check sheet used to self-monitor provides a prompt for future behavior. Prompts can be an efficient tool because of their ease of use and low cost. Prompts are an antecedent stimulus that signals the employee to perform a particular behavior (McConville, Hantula, & Axelrod, 1998). Milligan and Hantula (2005) successfully used prompts to increase suggestive selling in a small pet grooming business. Squires et al. (2007) used visual prompts to increase customer greeting and upselling in a restaurant. Prompts can be useful in the present study to signal SRs when to perform specific verbal behaviors in the appropriate context of the customer interaction.

BSM also serves as both a consequence of behavior, providing feedback from previous behavioral opportunities, and as a discriminant stimulus, because it proceeds the next occasion of behavior (Sulzer-Azaroff & Myers, 1991). Olsen and Austin (2001) stated that asking employees to record their behavior by filling out a check sheet may act as a prompt to perform particular behaviors but can also signal a discrepancy between employee performance and established goals, therefore acting as feedback. Hickman and Geller (2003) employed self-monitoring forms which asked short-haul drivers to reflect on their own safety behavior to decrease unsafe driving behaviors, such as over-speeding (defined as driving over 63 mph) and extreme braking (defined as speed decreasing by 7mph/second or more). In another study, cleaning behaviors were increased in a ski shop using a self-monitoring checklist, filled out by employees at the end of their shift, as part of an intervention (Doll,

Livesey, McHaffie, & Ludwig, 2007). Olson and Austin (2001) used a self-monitoring approach to increase safe driving behaviors for lone bus drivers. BSM also has potential value as feedback in other settings where employees work in isolation or with little supervision such as in sales calls.

Summary

More consumers are researching and finding the products that will meet their needs through the internet. This fact does not diminish the importance of effective SRs. Many customers will seek additional information, particularly for higher-end products such as steel buildings. SRs will need to perform effective verbal behaviors to assist the customer and close the sale. In the present study, SRs were not performing effective verbal behaviors consistently. They were incentivized for making sales but are not directly incentivized for performing behaviors. The contingency surrounding these behaviors needed to be better reinforced.

First, effective verbal behaviors were identified by examining the interlocking contingencies between SR and customer via statistical analyses of verbal behaviors in recorded phone calls. These verbal behaviors were then codified by redefining the sales call process using a focus group involving SRs. After identifying the appropriate verbal behavior process, SRs were given a check sheet of these behaviors for the self-recording of their performance. After four weeks of the self-observation intervention, a decision was made based on the effectiveness of the intervention. If the intervention was successful, a withdrawal phase was implemented. If the intervention had not taken effect, visual feedback was given.

Method

This study took place in the call center of a steel building retailer. The primary business of the company was to manufacture and sell steel buildings, including carports and chemical storage buildings, through sales calls, phone calls through their call center, and the company's websites. The company sold to a wide range of customers, from individuals looking for storage for their residence to companies in search of a building to store chemicals. The study was conducted within the call center phone conversations leading to sales of steel buildings and carports.

Participants and Setting

The study focused on the SRs within the call center. The sales unit was composed of fifteen sales people, along with a sales manager and an assistant manager. The sales unit comprised thirteen men and two women, with an age range of 21 to 45. The range of length of employment was six months to eight years. The majority of sales people did not have a post-secondary degree. The call center was divided into two units, one selling steel buildings while the other sold carports.

The experimental group was composed of five men ranging in age from 23 to 38. This group sold steel carports. The control group was composed of two men and one woman ranging in age from 28 to 43. This group sold steel buildings and carports.

The call center was in operation from 8 am to 9 pm, Monday through Friday, and 8 am to 5 pm on Saturday. SRs worked from either a small room or a cubicle. The SRs' primary responsibility was answering customers' questions via phone calls and e-mail. SRs also tracked customer leads through a lead management system, a computer program that stores a customer's information such as phone number and e-mail address, the type of

building the customer is interested in, and the customer's budget. This program allowed the SRs to follow up on a customer's initial call or request for a quote.

Once customers contacted the company seeking general information or a quote, SRs would use the stored information to call or e-mail the customer later to follow up on the customer's inquiry. SRs also followed up with customers when a request for a quote was submitted online. They were also responsible for handling many of problems that customers encountered, including inaccurate sales orders and scheduling conflicts with distributers. SRs were trained on how to perform a list of verbal behaviors focused on sales when they went through the onboarding process when first hired. Based on an analysis of recorded sales calls among the SRs (see below), these behaviors were being performed sporadically, if at all.

The consequences of performing these behaviors were indirect monetary incentives in the form of commission when they close sales (Malott, 1989, 1992). The SRs selling carports had a salary range of $25,000 to $75,000. The SRs selling steel buildings made $11.25 per hour. Each group received a tiered commission based on the dollar amount sold. For the experimental group selling carports, if they amount sold was in the base range of $0 to $25,000 in revenues, SRs received a base commission of $450. Any revenue beyond the base, SRs received a tiered percentage of that revenue.

The company signed a letter of participation agreeing that no employment outcomes would be based on the data collected in this study (see Appendix A) and the host University's Internal Review Board (IRB) approved the study (IRB# 13-0163, Appendix B).

Pinpointing verbal behaviors. The company used a call storage system that recorded calls in order to monitor phone calls for quality and training purposes. Calls were

stored up to two months after the event. The verbal behavioral categories were compiled and consolidated by listening to these archival calls. These behaviors were then presented to company marketing and sales managers in an initial project meeting. During this meeting, researchers discussed the verbal behaviors, their frequency during calls and an initial discussion of the value each behavior adds to the close of the sale. Later in this initial meeting, the head of the company presented a pre-existing list that each SR was given when first trained with the company. In a separate meeting, the managers in the marketing department discussed these items in more depth, agreeing that the items should be assessed during baseline.

The resulting verbal behavioral categories included:

A. Greeting the customer.
B. Ask for contact information.
C. Build a rapport with the customer (e.g., How is the weather?).
D. Identify a date in which the customer would like to erect the building.
E. Ask the customer what they will use the building for.
F. Ask what the customer is looking to spend.

This class of questions generated information to better assist the customer in identifying the building that will meet their needs. Once the building is identified, the SR may:

A. Suggest size that will meet the customer need and adjust from that point.
B. Ask what accessories customer will need.
C. State competitor prices for a similar building.
D. Asks if the customer is ready to purchase a building.
E. Create a crisis (Sale ends next week).
F. Close the sale if they are ready to purchase.

A list of verbal behaviors performed by the customer was then developed to assess the behaviors the SR seeks from the customer such as information that allowed the SR to determine the customer's need and ultimately led to a sale:

A. Provided all contact info.
    a. First and last name.
    b. Phone number.

    c. E-mail address.
    d. Zip Code where customer plans to erect building.

B. Engaged in "small talk" when initiated by the SR (e.g., The weather is beautiful here.)
C. Provided an estimated time they were planning to build.
D. Describe how they intended to use the building.
E. Reveal their budget for the building.

Once the sales-directed and customer-directed behaviors were identified, a behavioral checklist was developed for research observations and intervention operations. The following are the descriptions of the one-word phrases from the behavioral checklist: Asks for customer's contact information including e-mail address (Contact); Explains why asking for contact information is important (Explains); Did customer say that a Sales Rep had e-mailed them (E-mailed); Did the customer provide phone number (Phone); Did the customer provide e-mail address (Email); Did the customer provide the zip code where they plan to erect the building (Zip); Builds rapport (Rapport); Engaged in small talk when initiated by SR (Engaged); Asks customer if they plan on putting a building up soon (Timeline); Asks customer what type/size of building they are looking for (Type); Asks customer what they are using the building for (Project); Customer describes how they intend to use the building (Intend); Asks customer what their budget is (Budget); Customer reveals how much they want to spend (Spend); States that if you find it cheaper in writing, we will refund the difference (Cheaper); Asks what accessories customer needs (Accessories); States what warranty comes with different types of buildings (Warranty); States competitions' prices on similar buildings (Competition); States how much of a deposit can get the order started (Deposit); Did the customer buy on this phone call (Buy); Did the customer begin conversation saying they want to buy a building (Want).

Data Collection

Behavioral data. Research assistants listened to the archived phone calls using the behavioral checklist to collect data used in this study. Before the research assistants listened to calls, they were required to sign a document (Appendix C) stating they would not record and store any information from the calls, including but not limited to the customer's contact or credit card information. Research assistants were trained to identify the appropriate type of call (i.e., sales calls) to record the occurrence of behaviors of interest on a checklist.

Research assistants only observed calls that were a) received by a targeted SR and b) was a retail product of interest in the study. Calls could be identified because all calls were answered by the SR or other employees who stated their first name. They were also trained in recognizing when SRs had the opportunity to perform a behavior versus when they do not. That is, if the customer stated what would be a response to a question from a SR, the observation would be recorded as a "no-opportunity." Assistants were provided a list of SRs to identify targeted participants. Research assistants listened to the archival calls in a space located in the place of business, separate from where SRs worked.

During the training, I guided the assistants during the sessions to help identify the behaviors as they occurred. Then the observers conducted observations without the assistance. I assessed the data from these calls for reliability by listening to the same phone call independently. Once the assistant reached 80% agreement with me over three observations, the assistants were allowed to collect data on their own.

Because archival data were used, reliability was checked retroactively by the research assistants after receiving the observation records. The website used to listen to phone calls had an option to label the phone calls observed. Each observation made by the research

assistant was followed by the research assistant labeling the phone call as having been listened to. This label was then used to locate calls within the storage system. A second individual used an identical check sheet to those used in the initial observation to independently observe the call. The two observations were then checked against each other. Inter-observer agreement (IOA) was computed by dividing the number of agreements by the sum of the numbers of phone calls and multiplying by 100%.

Sales data. SR-specific sales data was obtained from the company. This data was used to compare the frequency of the SR and customer verbal behaviors observed in the archival phone calls with resulting sales.

Design

This study used an A-Aˆ-B-C design with a non-equivalent comparison group. Baseline observations (i.e., A) were conducted on archival phone data representing five weeks before the informed consent was administered (i.e., Aˆ) which itself occurred two weeks before the first intervention phase began. In the context of administering informed consent, the SRs were told that their recorded calls were being listened to for this study. This was done to assess the effect of being observed via recorded phone calls on performance. The first intervention phase (i.e., B) consisted of a focus group meeting where a new verbal process was designed and the ongoing use of a self-monitoring check sheet.

To determine the initial effect of the BSM intervention, I first compared the self-monitoring reports to the data collected through archival phone calls. If the SRs were not performing these behaviors in excess of a goal set during the focus group meeting, a second intervention phase (C) was implemented. External feedback was given to reinforce the rule of performing these behaviors leads to closing more sales which leads to increased pay.

A non-equivalent comparison group was established using a different department within the sales force. This department sold buildings in a similar manner described for the experimental group above, but was selling buildings at a higher price range. Research assistants used the same check sheets for the comparison group that were used for the experimental group. After observing for their scheduled time, they kept the check sheets and turned them into me.

Interlocking Contingency Analysis on Behaviors Linked to Sales

Using baseline data, correlational analyses were performed examining the relationship between the SR behaviors, customer behaviors, and customer buying decisions (i.e., sales). The results of the analysis were used to suggest which SR behaviors may be the most effective to emit key customer verbal behaviors and to ultimately close sales. This was done to reinforce the value of the intervention for the company and to create a contingency-specifying statement (Agnew & Redmon, 1992; Malott, 1989, 1992) linking behaviors to potential incentives achieved from closing the sale.

The SR behaviors that were found to be significantly correlated with sales were (See Table 1 for correlations and significance):

- Asks for customer's contact information including e-mail address.
- States what warranty comes with different types of buildings.
- States how much of a deposit can get the order started.
- Asks what accessories customer needs.

Though these were found to be significant, it may be that these behaviors are performed within a call because it was necessary to process the sales order and not because these behaviors led to the sale. This may be especially true of obtaining the customer's contact information and stating the amount for deposit to get an order started. The behaviors

identified in the analysis were then used to help guide the discussion in the focus group meeting. The customer behaviors found to be positively correlated with sales were:

- Provided phone number.
- Provided e-mail address.

Intervention

Focus group meeting. To build on the experience of the SRs and to best attain their buy-in (Erez & Arad, 1986), a focus group meeting was held at the start of the intervention phase. This meeting was composed of myself and one other researcher, who facilitated the meeting, and the SRs. See Appendix D for complete protocol for the meeting.

We began by describing the purpose of the meeting was to a) identify the verbal behaviors believed to best lead to closing the sale, b) increase commitment to performing behaviors, and c) link performance to incentives. The SRs were asked to write down four to six effective behaviors that lead to closing sales. The SRs were then asked, randomly one at a time, to state one of the behaviors they wrote down. We asked each SR to give two behaviors. We then reviewed the behaviors identified to make sure everyone understood each behavior and that each behavior they had written down was covered. SRs were asked if there were any behaviors were repetitive. We then stated the behaviors that were identified as significant for closing a sale from a correlational analysis. SRs were then asked to rank these behaviors as a group. We then presented the frequency in which the behaviors were performed by the group. From this discussion, the top behaviors were chosen and a check sheet to be used by SRs to prompt and self-monitor while on sales calls was finalized.

The behaviors chosen by the SRs were:

- *Ask for customer's e-mail address.
- Ask customer if they are putting up building soon.

- Ask customer what they are using the building for.
- Ask customer what their budget is.
- *State what warranty comes with gauge of frame.
- *State deposit amount to get order started.

Three of the five behaviors found to be significant (with asterisks above) in the correlational analysis linking behaviors to sales were identified by the SRs as important in closing the sale. The behavior that was not chosen by SRs even though it had a significant relationship with sales was "Asks what accessories the customer needs."

I then discussed SRs recording their performance on check sheets as a way to check their performance in each call. The SRs were also told that the check sheets were a way to prompt them to perform each of the behaviors they identified in the meeting. SRs were then asked what they thought a challenging yet attainable goal for behavior fluency would be.

The SRs were then reminded that their calls were being recorded and actual verbal behaviors were being observed. Based on this discussion, a goal of 40% was established for behavioral fluency for each SR. I then told SRs that if the goal is reached after five weeks, they would no longer use the check sheets to monitor themselves. If they did not reach their goal after five weeks, their self-monitoring would continue along with visual feedback. SRs were also trained on how to use the check sheets while on sales calls.

Check sheets. The behavior check sheet was developed based on the output of the ranking during the meeting. The check sheet was conceived as a prompt to remind SRs what behaviors should be performed in the sales calls. While on the call, the SRs were to follow the check sheet and record when they performed each behavior by marking the form. The SRs were to also record customer behaviors they heard on the call. This allowed for immediate, visual feedback on their performance. The SRs were to note the situation. SRs were to keep their observations in folders used specifically for storing their check sheets.

Each Friday, I obtained the self-monitoring check sheets to be analyzed against the actual verbal behavior data collected through observations from the recorded phone calls.

To determine if SRs met their goal of 40% behavioral fluency, I analyzed the percentage of times SRs performed each of the verbal behaviors to the number of opportunities the SR had to perform those behaviors. After five weeks of data collection, a decision was made if the goal of behavioral fluency was being met. If it was not being met, a second intervention phase with visual feedback would begin. If the goal was achieved, a withdrawal phase would begin with BSM being removed.

Performance feedback. The SRs failed to exceed the behavioral goal established in the focus group meeting, thus the performance feedback phase was implemented. The SRs were given a summary of their self-monitoring data each Monday (see example, Appendix E).

For each behavior targeted by the intervention, SRs were shown the percentage of behaviors performed by the number of opportunities to perform those behaviors. The summary also provided group data of each target behavior. Third, each SR received the number of self-observations they had completed for each week.

Extraneous event. The sales manager delivered a memo to the SRs containing a new introduction process for sales calls for the experimental group seven working days after the focus group was conducted. One of the behaviors listed in this introduction worksheet was an experimental item in the study, "Ask for customer's e-mail address."

Results

There were 947 phone calls observed as part of the study (693 recording the experimental group calls and 254 recording the comparison group calls) resulting in 11,364

observations of SR verbal behaviors (8,316 experimental group; 3,048 comparison group) and 8,523 observations of customer verbal behaviors (6,237 experimental group; 2,286 comparison group). There were 196 calls observed that were recorded by two independent raters conducting reliability checks, equaling 20.7% of the total phone calls. Table 2 shows the percentage of times raters agreed for each of the behaviors observed.

Data associated with a SR was included in the data analysis if there were at least six observations by research assistants for that SR in each phase (i.e., baseline, self-observation, self-observation plus external feedback). Based on this criterion, two employees were dropped from the study. An employee from the experimental group was dropped because that person stopped working at the place of business two weeks after the intervention began. An employee from the control group was dropped because the employee had an extended period of leave from work.

Table 3 shows the data provided by the SRs from their self-observation check sheets. Included in the table are the number of observations for each week and the percentage of times each SR observed performing each behavior. SRs collected self-monitoring data an average of 3.3 times a week with the check sheets being completed at least once a week only 35% of the time.

SR Verbal Behaviors

Table 4 shows the group means for each SR behavior across experimental phases for both the experimental and comparison groups. Overall means were calculated by averaging the number of times each SR performed a behavior in each phase and then averaging each SR's mean for the phase. Overall, the group of verbal behaviors related to sales increased 12 percentage points over baseline in the self-observation phase and increased four percentage

points in the feedback phase over baseline. This contrasted with the comparison group whose same verbal behaviors increased two percentage points over baseline in the self-observation phase and decreased .7 percentage points in the feedback phase from baseline.

To further analyze the impact of the intervention on SR behaviors and the interlock with customer behaviors, a series of Mixed Design 2 x 3 ANOVAs were used to analyze the changes in SR (i.e., baseline, self-observation, performance feedback) across groups (i.e., experimental vs. comparison) for each behavior. Table 5 shows the results of the series of Mixed Design ANOVAs for the composite of all phases across both groups for each behavior. Table 6 presents the results of Mixed Design ANOVAs comparing baseline to the self-observation phase and comparing baseline to the feedback phase for SR behaviors. To further understand behavioral change within the groups (i.e., experimental vs. comparison) Table 7 presents the Repeated Measures ANOVAs comparing all three phases of the intervention for SR behaviors. In these analyses, the main effect of all three phases was analyzed along with contrasts comparing the first phase to each subsequent phase.

Figure 1 show weekly means of target behaviors across experimental phases and experimental and comparison groups. Figures 2-6 show a set of cumulative graphs tracking the target behaviors for each member of the experimental group as a function of the experimental phases. The first six graphs in each figure are SR behaviors that were targeted in the study. The last graph is the customer's buying behavior for each SR.

The behavior "Contact" (asks for customer's contact information including e-mail address), increased 34 percentage points from baseline to the self-observation phase and increased 13 percentage points from baseline to the feedback phase for the experimental group while it increased 12 percentage points in the self-observation phase and increased six

percentage points in the feedback phase for the comparison group. In the Mixed Design analysis, Contact showed a statistically significant increase for the overall main effect and in the contrast main effects and interaction effects between baseline and the self-observation phase. In the Repeated Measures analysis, there was a significant difference in the main effect and contrast between baseline and the self-observation phase for the experimental group. This is contrasted with no significant results in the comparison group.

The behavior "Timeline" (asks customer if they plan on putting the building up soon), increased six percentage points from baseline to the self-observation phase and decreased two percentage points from baseline to the feedback phase for the experimental group while it increased one percentage point in the self-observation phase and increased four percentage points in the feedback phase for the comparison group. There were no statistically significant results found for Timeline in either the Mixed Design ANOVA or Repeated Measures ANOVA.

The behavior "Project" (asks customer what they are using the building for), increased 12 percentage points from baseline to the self-observation phase and increased one percentage point from baseline to the feedback phase for the experimental group while it increased three percentage points in the self-observation phase and decreased two percentage points in the feedback phase for the comparison group. In the Repeated Measures ANOVA, there was a statistically significant increase in the main effect and the contrast between baseline and the self-observation phase. There were no significant results in the comparison group.

The behavior "Budget" (asks customers what their budget is) increased one percentage point from baseline to the self-observation phase and decreased one percentage

point from baseline to the feedback phase for the experimental group while it decreased two percentage points in the self-observation phase and decreased one percentage point in the feedback phase for the comparison group. Though there were no significant results in the initial Mixed Design ANOVA, there was a statistically significant result in the contrast analysis for the main effect between baseline and the self-observation phase.

The behavior "Warranty" (states what warranty comes with different with different buildings) decreased one percentage point from baseline to the self-observation phase and decreased four percentage points from baseline to the feedback phase for the experimental group while it decreased 16 percentage points in the self-observation phase and decreased 17 percentage points in the feedback phase for the comparison group. In the Mixed Design ANOVA, there was a significant difference in the main effect and in the contrast main effect between baseline and the self-observation phase and between baseline and the feedback phase. There was also a significant difference in the contrast interaction effect between the baseline and self-observation phase. No significant results were found for either group in the Repeated Measures ANOVA.

The behavior "Deposit" (states how much of a deposit can get the order started) increased 18 percentage points from baseline to the self-observation phase and increased 17 percentage points from baseline to the feedback phase for the experimental group while it increased 13 percentage points in the self-observation phase and increased six percentage points in the feedback phase for the comparison group. In the Mixed Design analysis, Deposit significantly increased in the overall main effect and the contrast main effect between baseline and the self-observation phase. In the Repeated Measures analysis, there was a significant increase in the main effect, in the contrast between baseline and self-

observation phase, and between baseline and feedback phase. There were no significant results for the comparison group.

Customer Verbal Behaviors

Table 8 shows the group means for each customer behavior across experimental phases for both the experimental and control groups. The means were calculated by averaging the number of times each SR performed a behavior in each phase and then averaging each SRs mean. Overall, the group of customer verbal behaviors related to increased sales (see list in *Interlocking Contingency Analysis on Behaviors linked to Sales* in the methods section) increased 28 percentage points over baseline in the self-observation phase and increased 12 percentage points in the feedback phase over baseline. This contrasted with the comparison group whose same verbal behaviors decreased one percentage point from baseline in the self-observation phase and decreased nine percentage points from baseline in the feedback phase.

Table 9 shows the results of a series of Mixed Design ANOVAs of all phases across both groups for each behavior. Table 10 presents a series of Mixed Design ANOVAs comparing baseline to the self-observation phase and comparing baseline to the feedback phase for customer behaviors. Table 11 shows the results of Repeated Measures ANOVAs of all phases across both groups for each behavior, the contrasts comparing baseline to the self-observation phase and comparing baseline to the feedback phase for customer behaviors.

The behavior “Email” (did the customer provide their email address) increased 35 percentage points from baseline to self-observation phase and increased 17 percentage points in the feedback from baseline for the experimental group while it increased seven percentage points in the self-observation phase and decreased two percentage points in the feedback

phase for the comparison group. In the Mixed Design analysis, Email showed a statistically significant increase for the overall main effect and in the interaction effects. Email also showed significant results in the contrast main effects and interaction effects between baseline and the self-observation phase. In the Repeated Measures analysis, there was a significant difference in the main effect and contrast between baseline and the self-observation phase for the experimental group. This is contrasted with no significant results in the comparison group.

The behavior "Phone" (did the customer provide phone number) increased ten percentage points from baseline to self-observation phase and increased six percentage points in the feedback phase over baseline while it decreased nine percentage points in the self-observation phase and decreased 16 percentage points in the feedback phase. In the Mixed Design analysis, Phone showed a statistically significant result in the main effect of group. No significant results were found in the Repeated Measures analysis.

Sales Data

Figure 7 shows average weekly total sales for the experimental and comparison groups. Table 12 shows the "Total Sales" (total weekly sales in dollars across all SRs for each group) averaged across phases for both the experimental and comparison groups. Total Sales increased 126% from baseline to the self-observation phase and increased 133% in the feedback phase over baseline for the experimental group while total sales increased 36% in the self-observation phase and increased 29% in the feedback phase over baseline for the comparison group.

Figure 8 shows the percentage of times customer purchased a building during a sales call and Table 13 shows the means of customer buying decisions during the actual phone call

with the SR (i.e., "Buy") in both the experimental group and the comparison group. Buy increased ten percentage points from baseline to the self-observation phase and increased six percentage points in the feedback phase from baseline for the experimental group while it increased one percentage point in the self-observation phase from baseline and increased four percentage points in the feedback phase from baseline for the comparison group.

Table 14 shows the Repeated Measures ANOVA for Total Sales and Buy. For the experimental group, Total Sales increased significantly in the main effect and the contrasts between both baseline and the self-observation phase, and baseline and the feedback phase. For the comparison group, Total Sales change was not significant. For the experimental group, Buy was significant for the main effect and for the contrast between baseline and the self-observation phase. Buy was not significant for the comparison group.

Based on the data presented in Table 12, the experimental group sold an average of $83,580 per week during baseline, while the comparison group sold an average of $16,614 per week during baseline. During the intervention, the experimental group sold an average of $191,900 per week during the intervention, while the comparison group sold an average of $21,990 per week during the intervention. This translates into a difference of $108,320 per week, or a 130% increase, between baseline and the intervention for the experimental group and a difference of $5,376 per week, or a 32% increase, between baseline and the intervention for the comparison group. For the company, the difference between the experimental group's increased revenue and that of the comparison group's would translate into a difference of $5,353,088 in annualized revenue. Profit margins were not provided for this study.

For the experimental group, they earned the base pay of $450 during baseline (SR commission rates presented in the Method section). During the intervention phases, SRs earned an average $545.95 per week ($450.00 + $38,380·.25%). With this additional revenue resulting from their change in verbal behavior, SRs can earn $4,989 in additional commission over the course of a year.

Interlocking Contingency Analysis

The interlocking contingencies between SR verbal behaviors, customer verbal behaviors, and buying decisions of customers were analyzed using a path analysis on baseline data. A Structural Equation Modeling analysis was conducted to understand the interlocking contingencies between SRs and customers. It was believed that certain interlocking contingencies between SRs performing particular behaviors would lead to customers performing particular behaviors which in turn would lead to buying decisions (see Figure 9). The model tested if the SR behaviors presented in Table 4 would lead customers to engage in behaviors presented in Table 8 and then if this would eventually lead to buying behavior.

First, the global fit indices of the path-analysis, $\chi^2(1) = 67.57$, $p < .001$; CFI=.86; RMSEA=.07 indicated that the proposed set of relationships provided adequate fit to the data. Next, specific direct and indirect effects were examined to understand which SR behaviors led to sales. Significant results are shown in Table 15. SRs stating the amount of deposit had a significant direct effect and had an indirect effect through customer stating they wanted to buy on customer making a buying decision. Another indirect effect was found between the SR asking for contact information from the customer and customer making a buying decision through SR giving his or her phone number to the customer. Figure 10

shows a model representing the path analysis of the significant relationships between SR behaviors, customer behaviors, and buying decisions.

Discussion

SR Verbal Behaviors

The findings from this study are mixed. Though some evidence suggests that the intervention had an impact on some of the target behaviors, there are also aspects of the study that make it difficult to interpret the results. Obtaining informed consent from the SRs appeared to initiate an upward trend in behaviors before the intervention began, making it more difficult to determine the impact of the intervention. The intervention had the biggest impact on the behaviors Contact, Product, and Deposit; each increasing among all SRs following the intervention. Results of the intervention were mixed across experimental participants for the behaviors Timeline and Warranty. No change in behavior was seen for the behavior Budget across all the SRs. Despite these results, there is some evidence that suggests this may have been sufficient enough behavior change to have an impact on sales.

Two of the target behaviors increased for each SR. The item Contact (asks for customer's contact information including e-mail address) increased in the self-observation phase. It is unclear if these results are due to the present study's intervention or the intervention introduced by the sales manager who gave the SRs a company developed list of verbal behaviors that SRs were asked to perform.

Item Deposit (states how much of a deposit can get the order started) also increased during the self-observation phase. Deposit may have been verbalized by the SR after the customer has asked to purchase the structure. Therefore, one would expect to see a correlation between Deposit and the customer's buying behavior and the SRs sales data.

However, this was not observed in the data thus adding confidence in this behavior's independent change due to the intervention.

Item Project (asks customer what they are using the building for) showed an increase for every SR during the self-observation phase, excluding SR 113. Based on the discussion with SRs during the focus group, they likely found this behavior useful when determining the needs of the customer and building a level of rapport with the customer.

Item Timeline (asks customer if they plan on putting the building up soon) showed an increase for three of the SRs (SR 109, 112, and 113) during the self-observation phase. During the focus group meeting, SRs stated that discussing the customer's timeline enabled them to determine whether the customer was looking to buy now or if they were only calling in order to obtain prices on buildings.

Item Budget (asks customer what their budget is) did not show an increase for any SR. Though it is likely that SRs see this item as important for determining the needs of the customer, it is believed, based on discussions pre- and post-intervention, that the SRs found this behavior difficult to perform because of its personal nature. Some SRs believed that customers might think the SR is trying to adjust the price they quote based on their budget.

Item Warranty (states what warranty comes with different with different buildings) had mixed results. Though it showed an increase for two SRs, it decreased for the other three SRs following the intervention. Based on the discussion in the focus group meeting at the start of the intervention, SRs tried to avoid this behavior because some of them believed this could potentially reduce sales because only one gauge of building was covered by a partial warranty.

Customer Verbal Behaviors

The intervention had the biggest impact on the item Email (did customer providing their email address). This makes sense considering the increase in the corresponding SR behavior, Contact. The item Intend (describes how they intend to use the building) did not show any differences across the three phases. Though the corresponding SR behavior Project did show increases, the lack of results could be due to some customers previously describing how they intend on using the building before the SR asked for that information, which would mitigate possible any possible changes. The item Spend (reveals how much they want to spend) For the item Spend, the corresponding SR behavior Budget did not increase in the intervention, which lessened any impact on Spend.

Interlocking Contingencies between SRs and Customers

This study proposed to investigate the interlocking contingencies between SR and customer as a means of understanding the buying decisions of the customer in the context of the sales call. Camden and Ludwig (in press) described an interlocking contingency in terms of one individual's behavior influencing another and vice versa, ultimately producing an outcome. The sales process is a great example of this interaction with both the SR and the customer performing verbal behaviors called mands (i.e., a verbal behavior that is controlled by a variable that establishes a stimuli as a consequence) and tacts (i.e., a verbal behavior that is controlled by a discriminative stimulus) (Egan & Barnes-Holmes, 2011). It was expected that verbalizations by SRs may lead to critical verbalizations by the customer and these interactions would influence buying decisions.

Behavior changes in the verbalization of Deposit (states how much of a deposit can get the order started) directly impacted sales. Additionally, SR verbalizations of Deposit acted indirectly on sales by increasing the customer verbal behaviors of "Want" (did the

customer say they want to buy a building). It is possible that customers who say they Want to buy a building are more likely to buy if the SR stated the amount of the deposit to get the order started. In the present study, SRs used Deposit as a Tact (Egan & Barnes-Holmes, 2011) to directly prompt the customer to buy the building after costs are discussed. This is an attempt to let the customers know that they only need 10% of the funding initially to get the building, a small amount that may make the response cost of buying easier. In this case, it may be that customers are reinforcing SRs to state the Deposit contingent with the discriminant stimulus of stating that they Want to buy a building. SRs having heard this before may think they are close to closing a sale and know to state the Deposit so that customers will understand the amount to start the buying process. This then makes it more likely that the customer will purchase the building.

Additionally, when the SR asked for customer's contact information including e-mail address (i.e., Contact), customers increased the incidents where they provided their phone number. And when both of these events occurred the call was more likely to result in a sale. Though getting the email address was the central idea behind attempting to increase the frequency of the item Contact, it may be that SRs obtaining the customer's phone number signals that the customer is close to making the decision to purchase a building. Contact may have been a Mand (Egan & Barnes-Holmes, 2011) that reinforced SR verbal behaviors because in their response to the question, customers may seem more serious about purchasing a building and worth spending the extra time on. Additional behaviors serving as Tacts further stimulates the interlocking contingency with additional verbal behaviors from the customer and ultimately a buying decision.

The interlocking contingencies may also impact the SR verbal behavior as well as they are learned over time and shaped based on hundreds of phones calls. For example, SRs may have received negative responses from customers in the past when verbalizing certain questions. These experiences may end up punishing the verbal behaviors involved in verbalizing these questions even after the intervention whose intent was to prompt and reinforce these very behaviors. For example, one SR stated during the focus group meeting that he is uncomfortable asking for a customer's budget because he thinks it may be too personal for the customer.

Sales calls are also typically very complex manifestations of the interlocking contingencies maintaining both SR and customer behaviors. SRs may attempt to establish a rapport with the customer by asking how the weather is where the customer lives. If the customer responds negatively, this may affect the subsequent behaviors of the SR, which may impact whether the customer makes a purchase. SRs also use certain behaviors to gauge the interest of the customer in purchasing a product. For example, one SR stated in the focus group meeting that they ask customers how soon they plan on erecting a building as an "If Then" statement. If the customers state that they are not sure of their timeline, the SRs will then limit subsequent sales behaviors because they believe the customer is not interested in buying. Instead, SRs want to put their time and effort into sales calls they believe will lead to sales. Future studies should seek to further understand this complexity.

Sales Data

Evidence was found suggesting that changes in behavior were associated with customer buying decisions and, ultimately, to an increase in sales over the phases of the study. These results support the hypothesis that one can increase sales by changing the

verbal behavior of SRs and therefore affect the verbal behavior of customers and their buying decisions. The SRs and the company could potentially realize benefits from increased revenue with SR's taking more money home and the company bringing in more profits that can then be shared with employees and managers or reinvested into the company.

Limitations

There were numerous limitations of the study. First, the self-observation sheets were not filled out consistently by the SRs. During the focus group meeting they had agreed to do self-observations and complete the sheets. However, the sheets were completed at least once a week only 35% of the time. A possible cause may be that the sheets were time consuming. Though the sheets were adapted after the first week to allow SRs to take notes about the sales call on the check sheet, a more comprehensive effort in making the sheets easier to use would make them more practical for SRs. Additional resources such as time and money would allow for these changes. A second cause for the lack of self-observations was a miscommunication from the SR supervisor. This manager reportedly instructed SRs to only fill out the check sheets for calls that ended in making a sale two days after the present intervention began. Nevertheless, the sheets could have served a prompting function on the SR's desk during the workday. This may have served as an antecedent during the intervention.

A second limitation was the company discontinuing the use of the self-monitoring check sheets following the conclusion of the intervention, despite presenting the positive results of the intervention. Adapting the check sheets to be less time consuming may aid in incorporating the use of the check sheets into the company's daily operating procedures, in addition to increasing its use by the SRs. Possibly integrating the check sheets into existing

processes and computer programs would also allow for its continued use within the company. Stressing the positive results of the intervention with management and SRs by including this information on the check sheet itself or in weekly meetings may also help ingratiate its use.

A third limitation was the managerial extraneous actions, apart from the intervention, that may have truncated the impact of the intervention. First, the SR manager told the SRs to only fill out the check sheets for those calls that ended in closing a sale which was inconsistent with the intervention methodology and truncated the self-observations. Second, the company introduced their own behavioral intervention during the study by implementing a new sales process introduction. Management's intervention was designed to increase behaviors at the beginning of a call. Management's new protocol included a behavior that was intervened upon in the present study, which was "Give me an e-mail address I can send your quote to." The protocol included four other behaviors, which were "Good morning/afternoon, this is [name of company], my name is…, how can I help you?"; "What are you looking for today, a carport, garage, or a barn?"; "Let me have your zip code and we'll start pricing your building."; and "Let me tell you about [name of company]. We are the…" Because this new introduction process was given to the SRs two days after the self-observation phase of intervention commenced, this could potentially make it more difficult for the SRs to focus on the intervention for this study. SRs stated that focusing on management's intervention interfered with their ability to complete the check sheets, particularly in the first week.

A fourth limitation was the design of the performance feedback given to SRs during the third phase of the study. The feedback form was a two page document with data from external observations by the research assistants, including individual and group data, and the

observations from the SRs. Simplifying this information may have increased the effectiveness of this phase of the intervention. One possible method of simplifying this information could be presenting it in graphs similar to those found in Figures 2-6.

A fifth limitation was a potential seasonal increase in the number of calls the SRs were taking after the first two weeks of the intervention. This period is traditionally high in the volume of calls taken by SRs. Increased sale volume could have impacted the SRs ability to fill out the check sheets during this period and make it more difficult to determine any impact from the intervention.

A final limitation may have been the lack of variance in the verbal behaviors observed because of the inherent nature of dichotomous data. This may have limited the path analysis' ability to find any significant results.

Future Research

In future research, studies should seek to improve the Self-Observation method by considering ways to make the observations easier and more efficient or finding another method to prompt SRs to perform certain verbal behaviors. This method may include creating a workbook with check sheets that allow the SRs to keep them in a convenient area in their workplace. Another consideration is including a comprehensive check sheet that allows SRs to fill out all of the customer's information plus any important notes on the check sheet itself.

With the positive results from this study, future research should consider looking at additional aspects of the SR/customer interaction. For example, one could examine whether there are certain negative behaviors performed by SRs that decrease sales or study the amount of time the customer talks on the call compared to the SR and the effect it has on

sales, if any. Also, conducting focus group meetings SRs or gaining information directly from customers may inform effective selling behaviors that are not currently being performed. For instance, it may be that previous customers prefer a particular accessory that is not commonly asked about in the sales call setting. Therefore, the sales opportunity is lost because the customer is unaware of the accessory.

Researchers could also ask other research questions such as whether particular behaviors are more effective in the beginning or the end of the call. For example, SRs asking for customers' budgets early in the call may cause the customers to feel their privacy has been intruded upon. On the other hand, if the SRs ask for their budget after quoting a price, the SR could explain that there may be other options that fit their budget. Another research question may be whether "If Then" statements actually exist that can effectively signal the SR whether the customer is a serious buyer or these methods are "superstitious behaviors" (Lobmeyer & Wasserman, 1986) that are either unproductive or counterproductive.

Finally, future research should generalize the use of self-monitoring techniques to other professions. These could include those in healthcare, such as doctors and nurses, as a way to help reduce the continued growth in healthcare costs. Other professions that require specific steps in order to successfully complete a task could also benefit from self-monitoring techniques, such as firefighters, air traffic controllers and pilots, and human resource professionals.

Summary

The present study demonstrates that a sales process can be redesigned using correlational analysis and focus group meetings to identify verbal behaviors that lead to sales. Though it is often used within behavioral safety programs, this research also validates the

effectiveness of using the self-monitoring method to change SR's behavior, thereby acting on the interlocking contingency between the SR and the customer, and ultimately leading to more sales for the company and additional commission for the SR. Finally, this study provides a base of research involving the behaviors that lead to sales in the context of selling large, higher priced steel buildings. From this research, additional effective behaviors and strategies can be identified in this context and generalized to other sales contexts.

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Table 1.

Correlations of SR and Customer Behaviors to Buying Behavior of Customers and its Statistical Significance.

Behavior	Pearson Correlation	Statistical Significance
Contact	.472	.000
Accessories	.175	.044
Warranty	.202	.019
Deposit	.681	.000
Phone	.371	.000
Email	.396	.000

Note. SR behaviors are in bold and were used during the focus group meeting as evidence for their effectiveness during sales calls.

Table 2.

Percentage of Times Raters Agreed for Each of the Behaviors Observed.

Behavior	Percentage Agreed
Contact	96%
Explains	78%
E-mailed*	91%
Phone*	94%
E-mail*	95%
Zip*	92%
Rapport	92%
Engaged*	93%
Timeline	93%
Type	86%
Project	76%
Intend*	79%
Budget	99%
Spend*	99%
Cheaper	94%
Accessories	86%
Warranty	91%
Competition	98%
Deposit	94%
Buy	99%
Want*	83%

Note. * denotes customer behaviors. The following are the descriptions of the one-word phrases used in the table: Asks for customer's contact information including e-mail address (Contact); Explains why asking for contact information is important (Explains); Did customer say that a Sales Rep had e-mailed them (E-mailed); Did the customer provide phone number (Phone); Did the customer provide e-mail address (Email); Did the customer provide the zip code where they plan to erect the building (Zip); Builds rapport (Rapport); Engaged in small talk when initiated by SR (Engaged); Asks customer if they plan on putting a building up soon (Timeline); Asks customer what type/size of building they are looking for (Type); Asks customer what they are using the building for (Project); Customer describes how they intend to use the building (Intend); Asks customer what their budget is (Budget); Customer reveals how much they want to spend (Spend); States that if you find it cheaper in writing, we will refund the difference (Cheaper); Asks what accessories customer needs (Accessories); States what warranty comes with different types of buildings (Warranty); States competitions' prices on similar buildings (Competition); States how much of a deposit can get the order started (Deposit); Did the customer buy on this phone call (Buy); Did the customer say they want to buy a building (Want).

Table 3.

Number of Observations Completed by SRs and Percentage of Times a Behavior was Observed by each SR for each Week of the Intervention.

Participant	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
109								
# of Observations	7	0	18	0	0	0	0	0
Email	4%	--	83%	--	--	--	--	--
Timeline	14%	--	78%	--	--	--	--	--
Project	71%	--	61%	--	--	--	--	--
Budget	57%	--	67%	--	--	--	--	--
Warranty	14%	--	76%	--	--	--	--	--
Deposit	86%	--	94%	--	--	--	--	--
110								
# of Observations	12	14	0	0	0	0	0	0
Email	100%	43%	--	--	--	--	--	--
Timeline	0%	19%	--	--	--	--	--	--
Project	50%	61%	--	--	--	--	--	--
Budget	0%	7%	--	--	--	--	--	--
Warranty	58%	43%	--	--	--	--	--	--
Deposit	100%	50	--	--	--	--	--	--
111								
# of Observations	4	0	5	0	0	0	0	0
Email	100%	--	80%	--	--	--	--	--
Timeline	50%	--	60%	--	--	--	--	--
Project	50%	--	100%	--	--	--	--	--
Budget	0%	--	0%	--	--	--	--	--
Warranty	50%	--	40%	--	--	--	--	--
Deposit	100%	--	40%	--	--	--	--	--
112								
# of Observations	0	1	15	23	17	0	0	0
Email	--	100%	7%	13%	9%	--	--	--
Timeline	--	0%	87%	96%	82%	--	--	--
Project	--	100%	93%	96%	82%	--	--	--
Budget	--	0%	20%	39%	12%	--	--	--
Warranty	--	0%	33%	13%	24%	--	--	--
Deposit	--	0%	47%	30%	53%	--	--	--
113								
# of Observations	10	6	0	0	0	0	0	0
Email	100%	100%	--	--	--	--	--	--
Timeline	20%	50%	--	--	--	--	--	--
Project	10%	50%	--	--	--	--	--	--
Budget	0%	0%	--	--	--	--	--	--
Warranty	60%	50%	--	--	--	--	--	--
Deposit	100%	100%	--	--	--	--	--	--

Note. For the first three weeks, I asked for the check sheets from each SR and if they did not have any observations, I asked them to fill out as many as they could.

Table 4.

The Mean Percentage of All Behaviors Observed for the Experimental and Comparison Groups in Both Pre- and Post-Intervention Phases.

	Experimental Group			Comparison Group		
Behavior	**Phase 1**	**Phase 2**	**Phase 3**	**Phase 1**	**Phase 2**	**Phase 3**
Contact	20.5%	54.7%	33%	43.1%	55.3%	49.4%
Timeline	7.7%	13.9%	5.7%	4.8%	5.2%	8.3%
Project	4%	16.3%	4.5%	21.8%	24.4%	20%
Budget	1%	1.6%	0%	1.8%	0%	.9%
Warranty	16.1%	14.7%	11.9%	34.1%	18%	17.5%
Deposit	30.2%	48.4%	47.5%	17.7%	30.8%	24.1%
Explains	8.5%	29.9%	19.8%	24.5%	26.1%	28.5%
Rapport	2.5%	5.6%	5.4%	37.4%	28.4%	29.3%
Type	86.5%	85.6%	80.3%	91.4%	87.2%	84.1%
Cheaper	1.6%	17.3%	12.4%	0%	12.6%	11%
Accessories	15.6%	14.7%	7.2%	23.3%	13.8%	19%
Competition	1.1%	.3%	3.9%	0%	.8%	0%

Note. Behaviors that were intervened upon are in bold. Phase 1 represents the baseline phase, phase 2 represents the self-observation phase, while phase 3 represents the feedback phase.

Table 5.

Results of Mixed Design ANOVA for SR Behaviors.

	Interaction Effect with Group		Main Effect of Phase		Main Effect of Group	
Item	**F-value**	**Sig**	**F-value**	**Sig**	**F-value**	**Sig**
Contact	3.401	.068	14.343	.001*	2.069	.200
Timeline[b]	2.454	.128	.987	.419	.251	.634
Project[b]	.649	.540	2.051	.171	3.993	.093
Budget[b]	3.119	.081	1.303	.308	.002	.969
Warranty	2.884	.095	5.831	.017*	2.437	.170
Deposit[b]	.594	.567	5.370	.022*	1.814	.227
Explains[b]	1.542	.254	2.110	.164	1.719	.238
Rapport[b]	2.565	.118	.596	.567	8.495	.027*
Type	.028	.973	.448	.649	.556	.484
Cheaper	.131	.878	8.089	.006*	.345	.578
Accessories[b]	1.847	.200	1.957	.184	1.207	.314
Competition[b]	3.213	.076	1.689	.226	4.345	.082

Note. * denotes a statistically significant result at the .05 level. [b] denotes a violation of the assumption of homogeneity. When this violation occurred, Welch's F was computed using a one-way ANOVA in order to compare its results with the between groups results found in the Mixed Design analysis. Results were similar in both instances. Behaviors intervened upon are in bold. The reported degrees of freedom for the main effect and the interaction effect were (2, 12), while it was (1, 6) for the main effect of group. For those items that violated the assumption of sphericity for the main effect and the interaction with group, the degrees of freedom were (1.954, 11.725).

Table 6.

Results of Contrasts Analysis from Mixed Design ANOVA for SR behaviors.

	Interaction Effects with Group				**Main Effects of Phase**			
	Phase 1 vs Phase 2		**Phase 1 vs Phase 3**		**Phase 1 vs Phase 2**		**Phase 1 vs Phase 3**	
Item	**F-value**	**Sig**	**F-value**	**Sig**	**F-value**	**Sig**	**F-value**	**Sig**
Contact	6.190	.047*	.396	.552	27.433	.002*	3.640	.105
Timeline	.943	.369	2.358	.176	1.290	.299	.195	.674
Project	.660	.448	.090	.774	1.562	.258	.030	.869
Budget	6.990	.038*	.006	.939	1.475	.270	2.172	.191
Warranty	6.396	.045*	2.699	.152	9.127	.023*	7.721	.032*
Deposit	.289	.610	1.179	.319	11.105	.016*	5.608	.056
Explains	3.279	.120	.320	.592	4.429	.080	1.426	.277
Rapport	3.115	.128	2.889	.140	.743	.422	.645	.453
Type	.120	.741	.006	.940	.271	.621	1.018	.352
Cheaper	.143	.719	.001	.977	11.486	.015*	9.312	.022*
Accessories	2.242	.185	.266	.625	3.194	.124	2.456	.168
Competition	2.756	.148	2.233	.186	.000	.996	2.233	.186

Note. * denotes a statistically significant result at the .05 level. Behaviors intervened upon are in bold. The reported degrees of freedom for items in the experimental group were (1, 6).

Table 7.

Results of Repeated Measures ANOVA for SR Behaviors Across All Three Phases.

	Main Effect of Phase		**Phase 1 vs Phase 2**		**Phase 1 vs Phase 3**	
Item	**F-value**	**Sig**	**F-value**	**Sig**	**F-value**	**Sig**
Contact[1]	16.993	.001*	35.190	.004*	2.965	.160
Contact[2]	1.889[a]	.303[a]				
Timeline[1]	3.111	.100				
Timeline[2]	3.781	.120				
Project[1]	8.385	.011*	9.558	.037*	.022	.888
Project[2]	1.832	.272				
Budget[1]	3.478	.082				
Budget[2]	3.976	.112				
Warranty[1]	.569	.558				
Warranty[2]	1.175	.397				
Deposit[1]	11.060	.005*	14.066	.020*	11.177	.029
Deposit[2]	1.031	.435				
Explains[1]	9.859	.007*	35.124	.004*	4.372	.105
Explains[2]	.688	.553				
Rapport[1]	1.125	.371				
Rapport[2]	1.017	.439				
Type[1]	.446	.655				
Type[2]	.034	.967				
Cheaper[1]	5.939	.026*	9.932	.034*	5.937	.071
Cheaper[2]	3.364	.139				
Accessories[1]	4.032	.062				
Accessories[2]	1.012	.441				
Competition[1]	4.439	.050*	1.941	.236	3.969	.117
Competition[2]	3.975	.112				

Note. [1] denotes the experimental group while [2] denotes the comparison group. [a] denotes a violation of the assumption of sphericity. Greenhouse-Geisser was used when this violation occurred. * denotes a statistically significant result at the .05 level. Items in bold are behaviors intervened upon. The reported degrees of freedom for the main effect were (2, 8) for the experimental group while they were (2, 4) for the comparison group. The reported degrees of freedom for the contrasts were (1, 4) for the experimental group while they were (1, 2) for the comparison group.

Table 8.

The Mean Occurrences of All Customer Behaviors Observed for the Experimental and Comparison Groups in Both Pre- and Post-Intervention Phases.

	Experimental Group			**Comparison Group**		
Behavior	**Phase 1**	**Phase 2**	**Phase 3**	**Phase 1**	**Phase 2**	**Phase 3**
Email	19.4%	53.9%	35.9%	42.9%	49.5%	40.5%
Phone	20.2%	14.5%	17%	49%	39.8%	33%
Spend	2.5%	1.8%	.6%	0%	0%	.9%
Emailed	19.2%	14.5%	17%	13.8%	5%	9.2%
Intend	42.2%	49.5%	46.4%	48.3%	50.8%	55.9%
Zip	83.3%	85.1%	79.9%	93.5%	89.2%	81.5%
Engaged	3%	5.9%	5.4%	35.3%	28.8%	27.5%
Want	10%	22.3%	18.6%	16.9%	13.8%	31.2%

Note. Customer behaviors related to buying decisions are in bold.

Table 9.

Results of Mixed Design ANOVA for Customer Behaviors.

	Interaction Effect with Group		Main Effect of Phase		Main Effect of Group	
Item	**F-value**	**Sig**	**F-value**	**Sig**	**F-value**	**Sig**
Emailed	.125	.883	1.304	.307	10.194	.019*
Phone	2.722	.106	.734	.501	6.263	.046*
Email	4.849	.029*	10.350	.002*	.990	.358
Zip	.816	.465	2.913	.093	4.369	.082
Engaged[b]	1.829	.203	.419	.667	7.811	.031*
Intend	.269	.769	.634	.547	1.414	.279
Spend	.195	.826	3.283	.073	.206	.666
Want[b]	2.632	.113	2.906	.093	1.040	.347

Notes. * denotes a statistically significant result at the .05 level. [b] denotes a violation of the assumption of homogeneity. When the violation of the assumption of homogeneity occurred, Welch's F was computed using a one-way ANOVA in order to compare its results with the between groups results found in the Mixed Design analysis. Results were similar in both instances. The reported degrees of freedom for the main effect and the interaction effect were (2, 12), while it was (1, 6) for the main effect of group. Those items that violated the assumption of sphericity for the main effect and the interaction with group, the degrees of freedom were (1.954, 11.725).

Table 10.

Results of Contrasts Analysis from Mixed Design ANOVA for Customer Behaviors.

	Interaction Effects with Group				**Main Effect of Phase**			
	Phase 1 vs Phase 2		**Phase 1 vs Phase 3**		**Phase 1 vs Phase 2**		**Phase 1 vs Phase 3**	
Item	**F-value**	**Sig**	**F-value**	**Sig**	**F-value**	**Sig**	**F-value**	**Sig**
Emailed	.722	.428	.050	.831	7.606	.033*	.387	.557
Phone	5.221	.062	4.159	.088	.016	.902	.908	.377
Email	14.118	.009*	2.909	.139	30.395	.001*	1.605	.252
Zip	2.186	.190	1.015	.353	.377	.562	3.353	.117
Engaged	1.789	.230	2.426	.170	.263	.626	.654	.450
Intend	.131	.730	.124	.737	.557	.484	1.459	.272
Spend	.398	.551	.105	.757	1.986	.208	4.874	.069
Want	3.065	.131	.315	.595	1.063	.342	4.847	.070

Note. * denotes a statistically significant result at the .05 level. The reported degrees of freedom for items in the experimental group were (1, 6).

Table 11.

Results of Repeated Measures ANOVA for Customer Behaviors Across all Three Phases.

	Main Effect		Phase 1 vs Phase 2		Phase 1 vs Phase 3	
Item	**F-value**	**Sig**	**F-value**	**Sig**	**F-value**	**Sig**
Emailed[1]	.404	.681				
Emailed[2]	.954[a]	.432[a]				
Phone[1]	1.430	.294				
Phone[2]	1.755	.284				
Email[1]	16.531	.001*	40.999	.003*	4.617	.098
Email[2]	1.149	.403				
Zip[1]	1.212	.347				
Zip[2]	1.502	.326				
Engaged[1]	.850	.463				
Engaged[2]	.738	.533				
Intend[1]	.575	.585				
Intend[2]	.372	.711				
Spend[1]	1.750	.234				
Spend[2]	1.595	.310				
Want[1]	2.601[a]	.178[a]				
Want[2]	2.474	.200				

Note. * denotes a statistically significant result at the .05 level. [a] denotes a violation of the assumption of sphericity. Greenhouse-Geisser was used when this violation occurred. Phase 1 represents the pre-intervention phase, phase 2 represents the self-observation phase, while phase 3 represents the feedback phase. [1] denotes the experimental group while [2] denotes the comparison group. The reported degrees of freedom for items in the experimental group were (2, 8) while it was (2, 4) for the comparison group. For the comparison group, item Emailed did not meet the assumption of sphericity nor did the item Want in the experimental group. Therefore, the Greenhouse-Geisser correction was used for both items. The degrees of freedom for the item Emailed in the comparison group was (1.001, 2.002) while the degrees of freedom for the item Want in the intervention was (1.068, 4.274). The reported degrees of freedom for the contrasts were (1, 4) for the experimental group while they were (1, 2) for the comparison group.

Table 12.

Mean of Weekly Total Sales Across Phases.

SR	Baseline	Self-Monitoring	Performance Feedback
109	$14,486.26	$12,743.44	$31,409.74
110	$13,253.60	$35,848.77	$33,497.44
111	$13,708.11	$38,708.28	$29,586.54
112	$28,267.87	$55,124.50	$46.443.43
113	$13,855.59	$46,390.88	$54,055.08
101	$1,447.91	$4,469.13	$1,897.40
102	$1,052.17	$4,123.33	$3,259.84
103	$14,112.64	$13,967.75	$16,264.40

Note. SRs in the experimental group are in bold.

Table 13.

Percentage of Times Customer was Observed Making a Purchase.

SR	Baseline	Self-Monitoring	Performance Feedback
109	8.8%	24.2%	8.3%
110	9.1%	16.9%	22.9%
111	20%	18.8%	21.4%
112	16.7%	28.8%	22.2%
113	10%	26.5%	17.2%
101	0%	7.1%	16.7%
102	3.3%	0%	0%
103	11.1%	9.5%	9.2%

Note. SRs in the experimental group are in bold.

Table 14.

Results of the Repeated Measures ANOVA of SR's Average of the Weekly Total Sales in Dollars and the Mean of the Item Buy.

	Main Effect		Phase 1 vs Phase 2		Phase 1 vs Phase 3	
Item	**F-value**	**Sig**	**F-value**	**Sig**	**F-value**	**Sig**
Total Sales[1]	11.212	.005*	12.602	.024*	24.111	.008*
Total Sales[2]	1.899	.263	3.473	.203	7.719	.109
Buy[1]	4.778	.043*	9.994	.034*	4.886	.092
Buy[2]	.558[a]	.533[a]	.052	.840	.487	.557

Note. * denotes a statistically significant result at the .05 level. [1] denotes the experimental group while [2] denotes the comparison group. The reported degrees of freedom for both Total Sales and Buy for the experimental group were (2, 8) for the main effects while it was (1, 4) for the contrasts. The reported degrees of freedom for Total Sales for the comparison group was (2, 4) for the main effects while it was (1, 2) for the contrasts. Because the item Buy for the comparison group violated the assumption of sphericity, the degrees of freedom was (1.001, 2.002) while it was (1, 2) for the contrasts.

Table 15.

Results of Interlocking Contingency Analysis.

	Standardized Estimate	SE	*p*-value
Significant direct effects on BUY			
DEP	.40	.08	.000
Significant indirect effects on BUY			
DEP → WAN	.13	.05	.006
CON → PHO	.18	.05	.000

Note. SR behaviors are "Deposit" (States how much of a deposit can get the order started) and "Contact" (Asks for customer's contact information including e-mail address). Customer behaviors are "Want" (Did the customer say they want to buy a building) and "Phone" (Did the customer provide phone number) and "Buy" (Did the customer buy on this phone call).

Figure Captions

Figure 1. Percentage of Each Behavior Performed Across Experimental Phases for the Experimental and Comparison Groups. The darkened markers and lines represent the experimental group. Intervention phase 1 began with the focus group meeting with SRs from the experimental group followed by SRs completing self-observation check sheets. Increases in behaviors were seen in the experimental group for four of the six behaviors (Contact, Timeline, Project, and Deposit) in the first intervention phase. Decreases were seen for each of those four behaviors in the second intervention, though these remained above baseline.

Figures 2-6. Cumulative Graphs of the Number of Behavioral Occurrences for Each Behavior for SRs in the Experimental Group. Because customers would state what would be a response to behavior being studied, this would cause the SRs to not have an opportunity to perform those behaviors. Therefore, no opportunity observations were not included in these graphs. For this reason, the number of observations is limited for some behaviors. Also, the vertical axis has varying scales based on the number of behavioral occurrences in each. The first six graphs in each figure are SR behaviors that were targeted in the study. The last graph is the customer's buying behavior for each SR.

Figure 7. Average Weekly Total Sales for the Experimental and Comparison Groups.

Figure 8. Percentage of Times Customer Purchased a Building During a Sales Call.

Figure 9. SR/Customer Interlocking Contingency Model. Shows that the model suggests that the interaction of the SR and customer leads to a customer either buying or not.

Figure 10. Model of Path Analysis Showing Statistically Significant Relationships Between SR Verbal Behaviors, Customer Verbal Behaviors, and Customer Buying Decision. * denotes significance at $p<.01$. SR behaviors are "Deposit" (States how much of a deposit can get the order started) and "Contact" (Asks for customer's contact information including e-mail address). Customer behaviors are "Want" (Did the customer say they want to buy a building) and "Phone" (Did the customer provide phone number) and "Buy" (Did the customer buy on this phone call).

Figure 1.

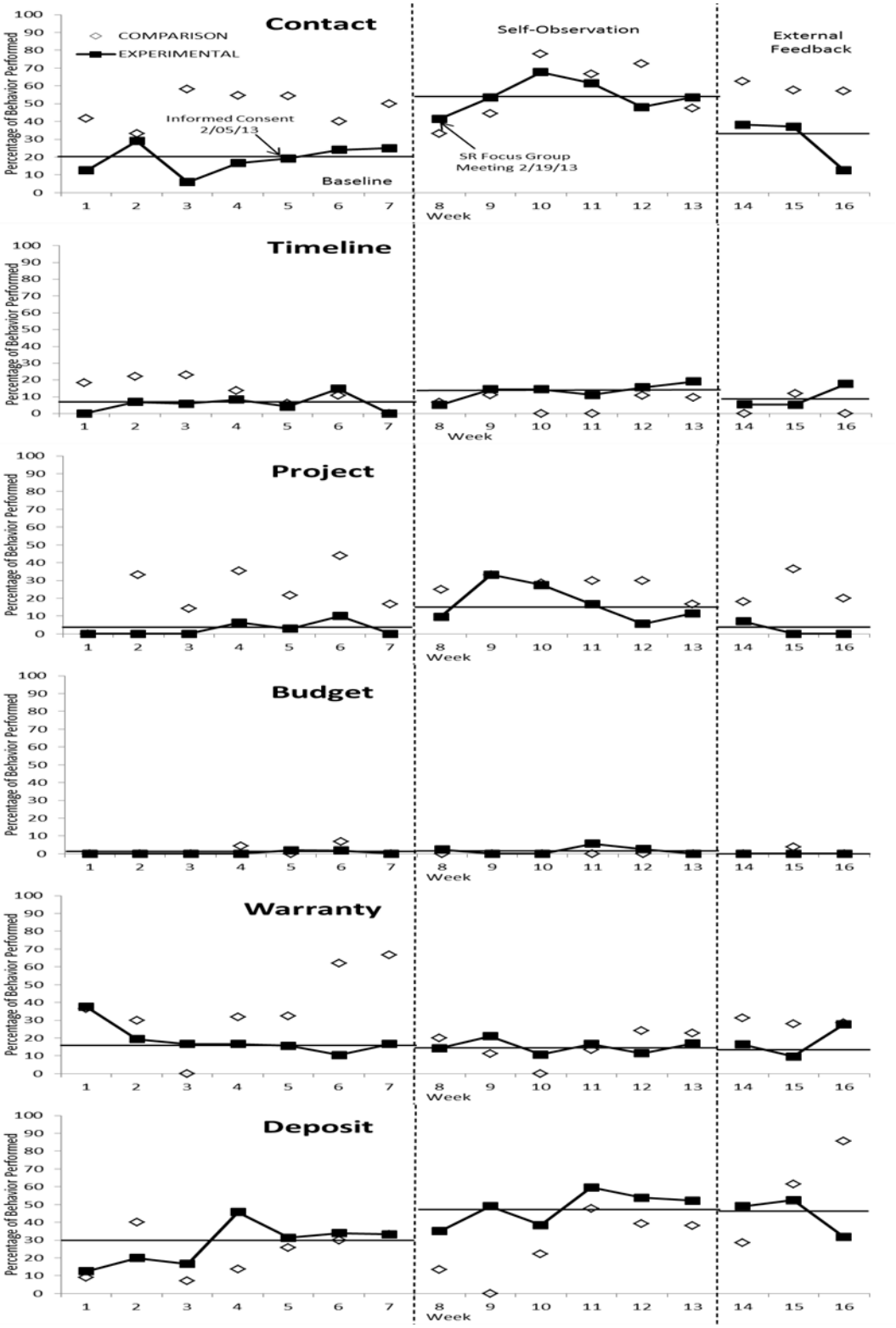

Contact
COMPARISON
EXPERIMENTAL
Informed Consent 2/05/13
Baseline
Self-Observation
SR Focus Group Meeting 2/19/13
External Feedback
Timeline
Project
Budget
Warranty
Deposit
Percentage of Behavior Performed
Week

Figure 2.

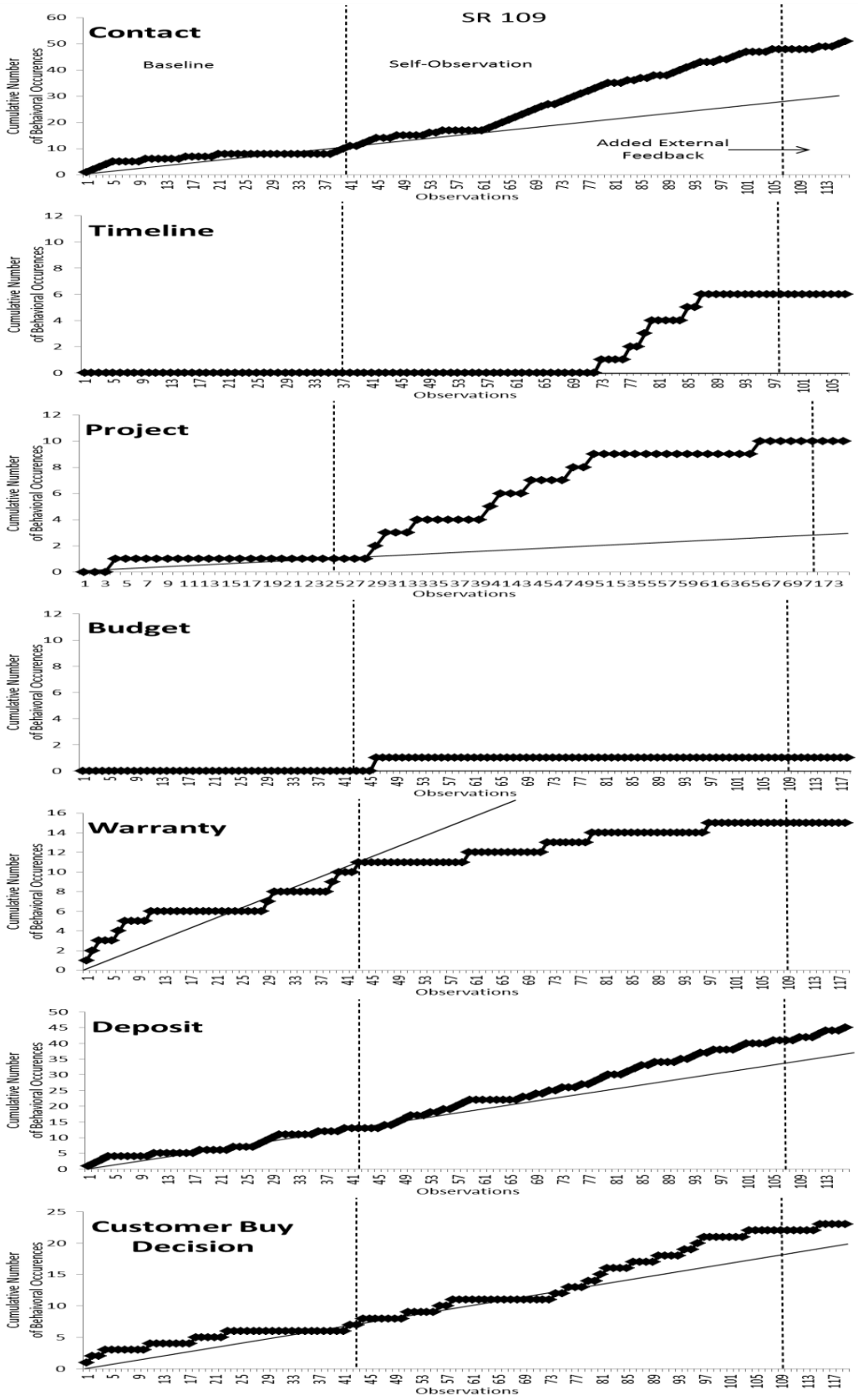

SR 109
Contact
Baseline
Self-Observation
Added External Feedback
Timeline
Project
Budget
Warranty
Deposit
Customer Buy Decision
Cumulative Number of Behavioral Occurences
Observations

Figure 3.

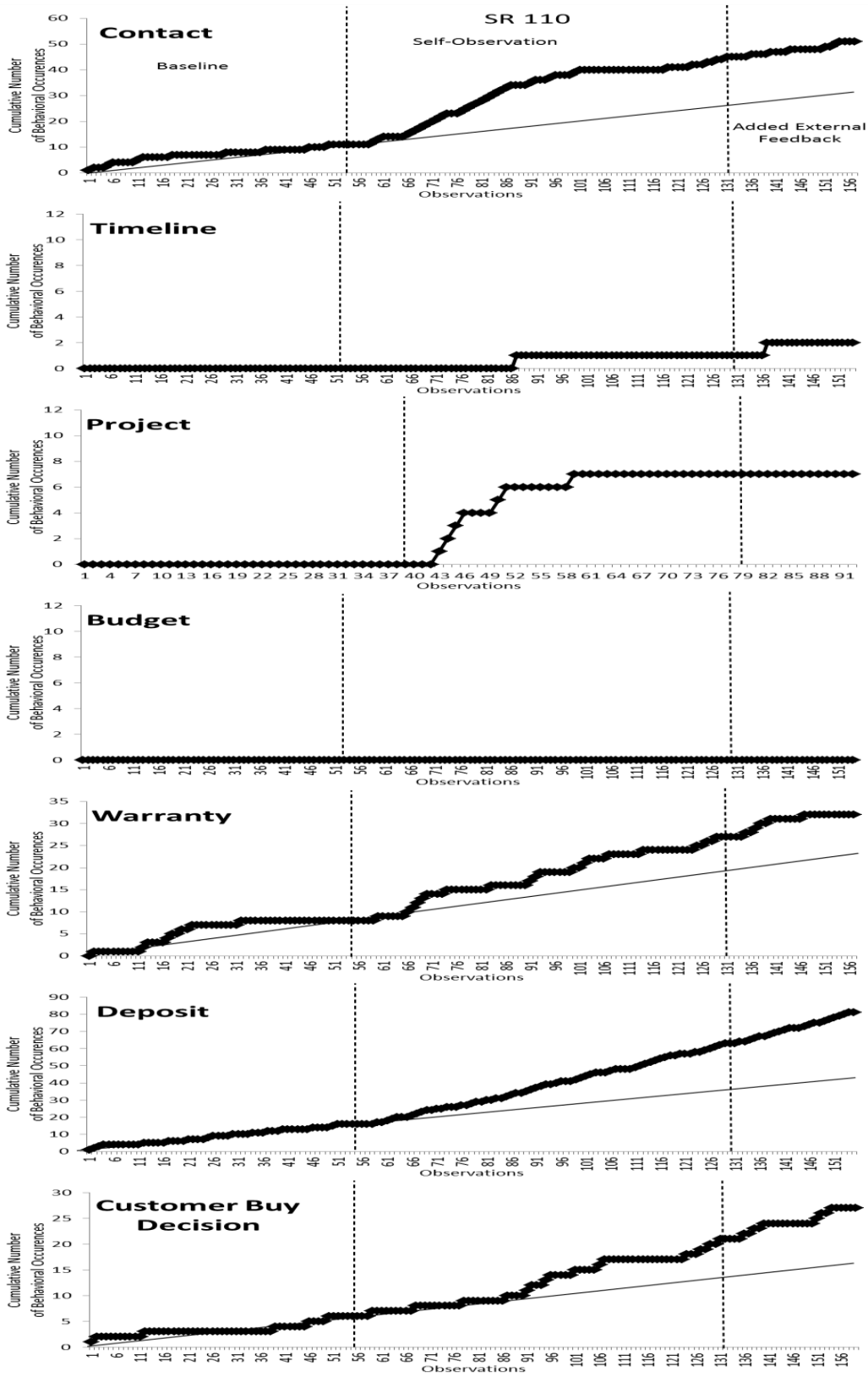

SR 110
Contact
Baseline
Self-Observation
Added External Feedback
Timeline
Project
Budget
Warranty
Deposit
Customer Buy Decision
Cumulative Number of Behavioral Occurences
Observations

Figure 4.

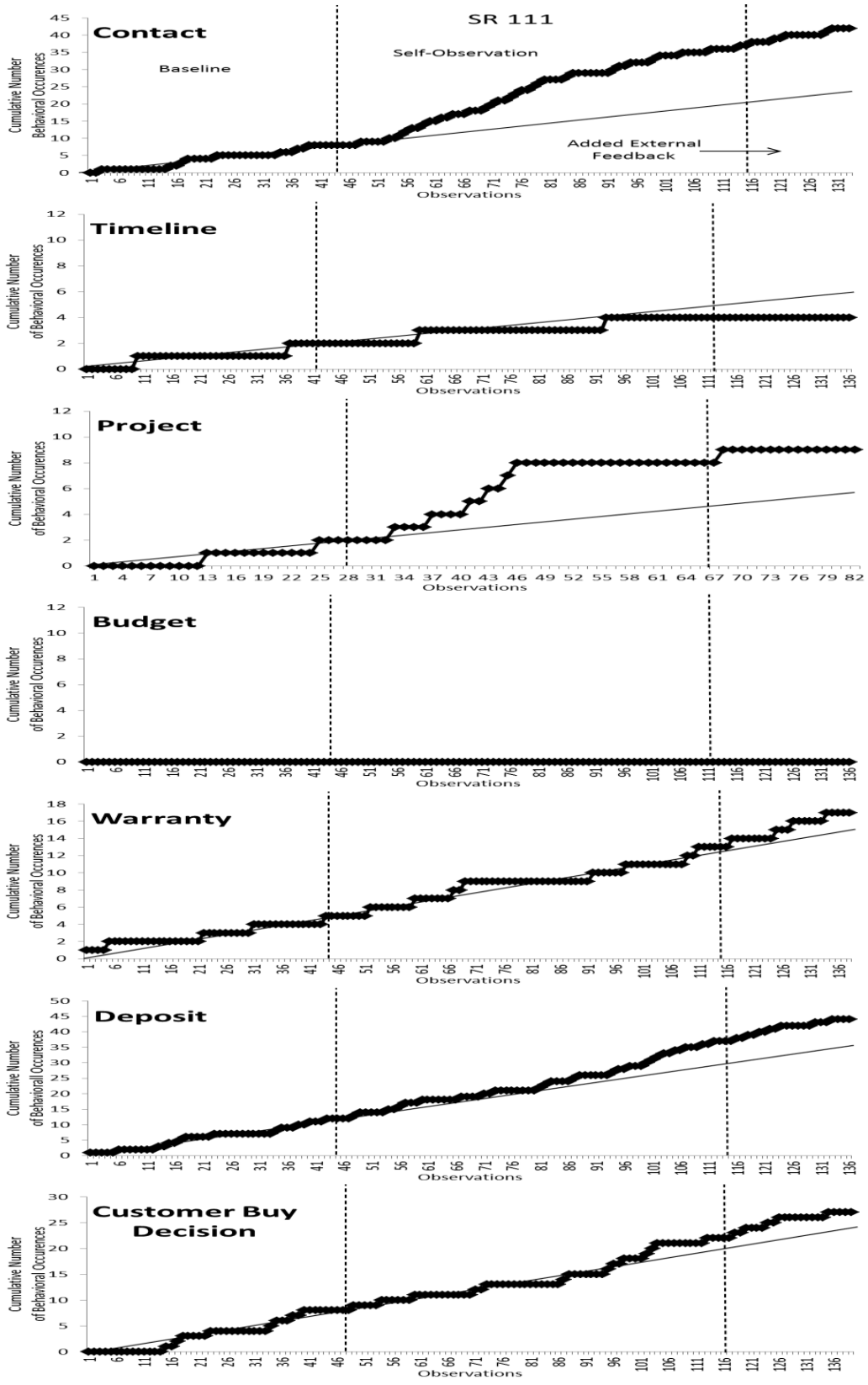

SR 111
Contact
Baseline
Self-Observation
Added External Feedback
Timeline
Project
Budget
Warranty
Deposit
Customer Buy Decision
Cumulative Number of Behavioral Occurences
Observations

Figure 5.

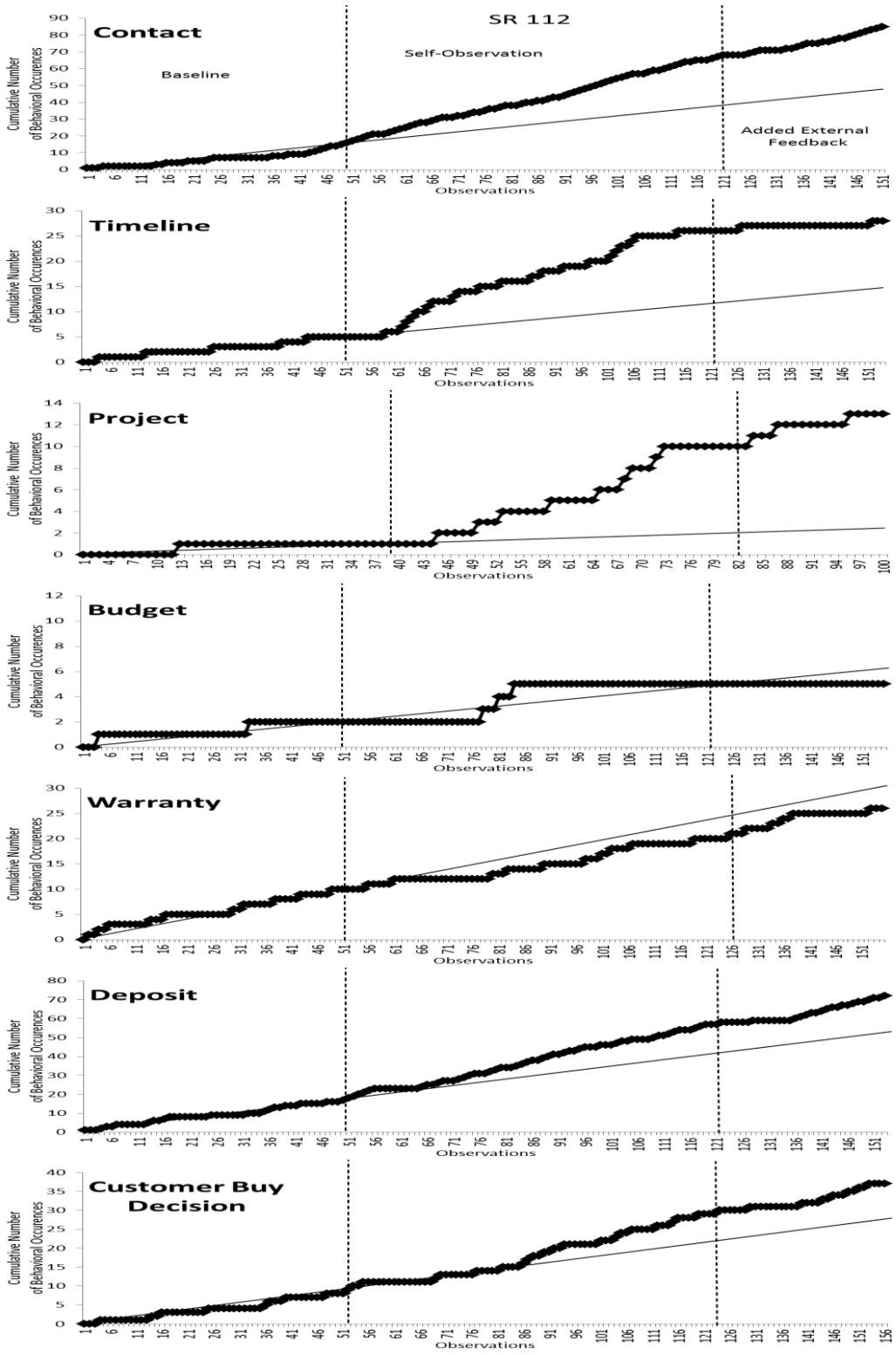

SR 112
Contact
Baseline
Self-Observation
Added External Feedback
Timeline
Project
Budget
Warranty
Deposit
Customer Buy Decision
Cumulative Number of Behavioral Occurences
Observations

Figure 6.

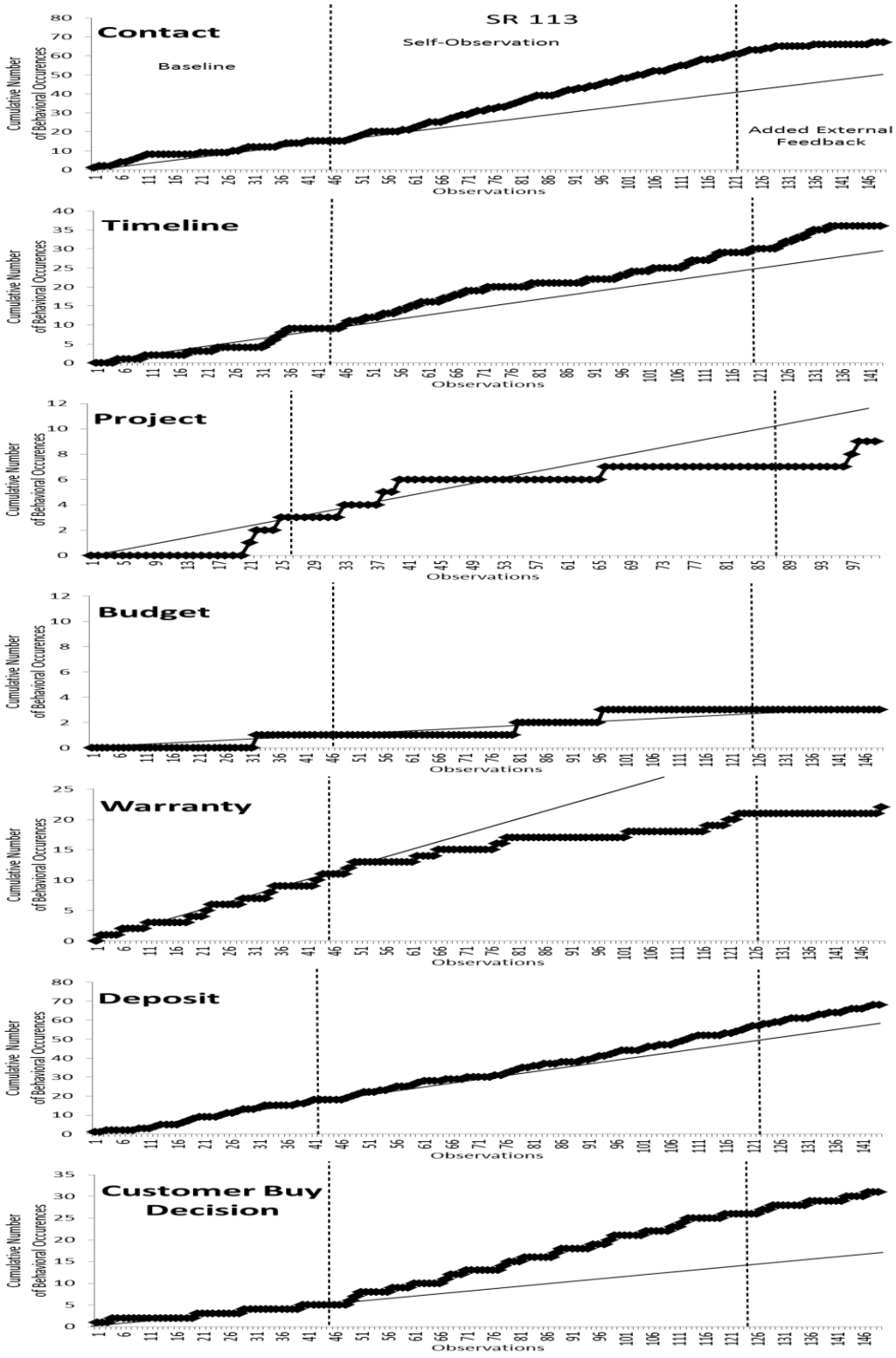

SR 113
Contact
Baseline
Self-Observation
Added External Feedback
Timeline
Project
Budget
Warranty
Deposit
Customer Buy Decision
Cumulative Number of Behavioral Occurences
Observations

Figure 7.

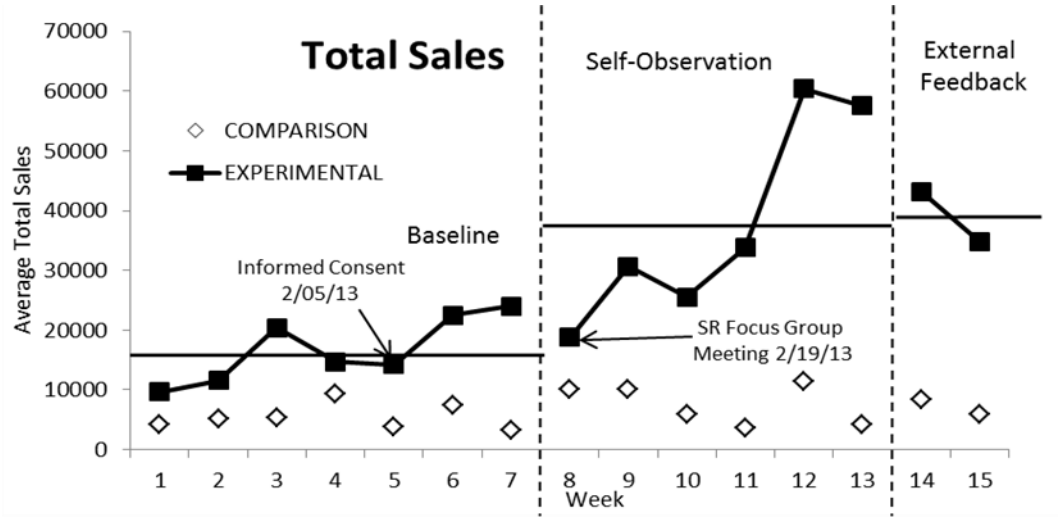


Figure 8.

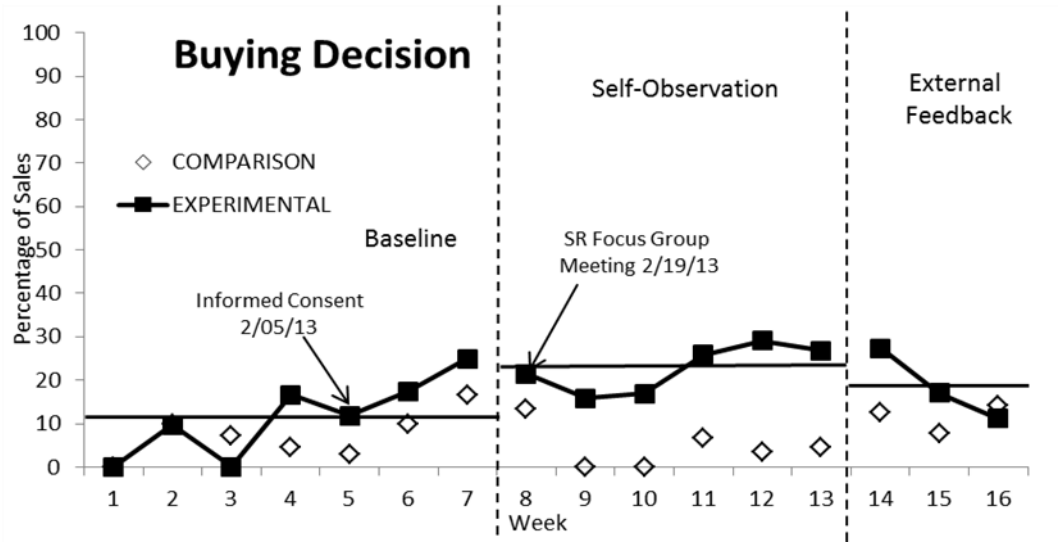


Figure 9.

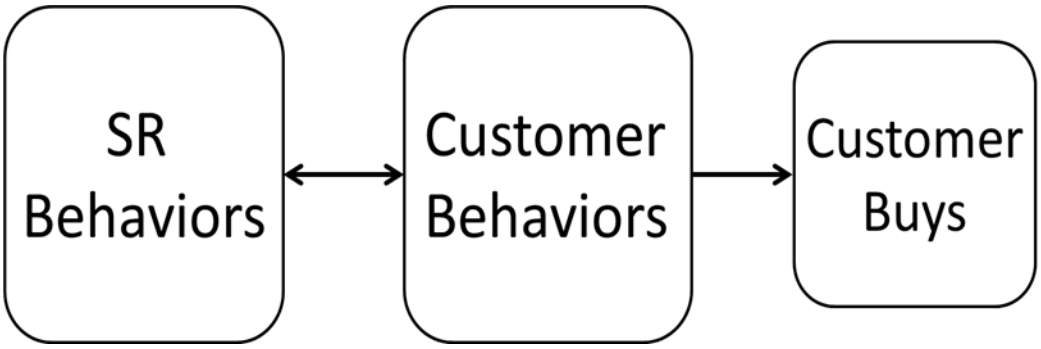
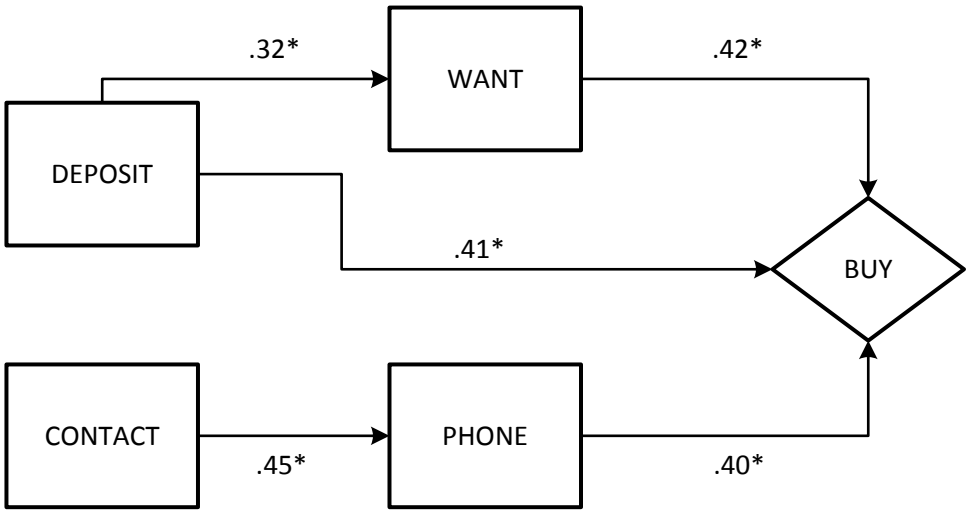


Figure 10.



Appendix A

MEMO OF AGREEMENT

TO: [redacted]
FROM: Timothy Ludwig, Appalachian State University

DATE: October 4th, 2012

Jason Copeland, a graduate-level student enrolled in the Industrial Organizational Psychology and Human Resource Program at Appalachian State University, is completing a Master's Thesis in conjunction with his degree. As part of his thesis, Jason will be working with [redacted], who is in the process of an Organizational Behavior Management initiative. Within this project, Jason requests the following:

1) Information regarding a recently completed systems analysis in order to gain an appreciation for the context of the initiative;
2) Access to the company databases related to the project;
3) Access to managers and employees who are involved in the marketing strategy within the company; and
4) Any other available resources that may aid in the goal of the project.

If you agree to participate in this project we would request the following of you:

- Allow Jason to work with your management and employees to gain information, validate, problem solve, and make proposals around the content of your business.
- Provide the student with applicable records, allow the student to interview, survey, and conduct meetings with employees, and provide the student access to observe processes in action.
- Provide the student with a Point of Contact that he can contact frequently to schedule meetings and ask questions.

As Jason conducts this project we understand that:

- All information gained will be confidential and viewed only by Jason Copeland, his research assistants, and his thesis advisor, Dr. Timothy Ludwig. The company may decline to provide any information that is proprietary.
- All company information will be kept in a secure password protected database. No data will be transferred electronically. All data will be destroyed after the reporting phase of the project is completed.
- Employee participation in this project is strictly voluntary and not a condition of employment. Employees cannot experience negative employment outcomes as a result of participation in this project.
- Any data obtained through the project are kept confidential. Names of employees or of management who participate will not be revealed.

- The company may adapt their participation or withdraw from the project at any time due to business necessity or other concerns.
- The company will agree to summaries of the data appearing in reports such as the research thesis itself and as part of student's job resume or interview portfolios. The company can request that the report be de-identified (project reports with no company name nor company specifics). Similarly, this project may be useful to present at professional/research conferences and be published in professional/research journals. If desired, the company will be recognized on reports generated for its participation in the research. If not, the reports will be de-identified. The company will be able to review and make comments on any reports generated from this project.

This project will be conducted with the highest ethical considerations and designed to not interrupt the daily operations of the business. Jason will be expected to act as a professional and add value to the company. Similarly, it is expected that all members of the company treat Jason with respect and consideration. Dr. Ludwig will be personally involved with the project design and management. You may contact him at any time by calling 262-2712 or e-mailing me at ludwigtd@appstate.edu.

U.S. Buildings is under no obligation outside of the specified thesis project. A copy of the completed project report will be provided to the company in appreciation for your co-operation in this endeavor, and as a reminder of our gratitude for your commitment to education.

_____

Jason Copeland

_____

[redacted]

Authorized Representative

Appendix B

IRB Approval

Appalachian STATE UNIVERSITY

INSTITUTIONAL REVIEW BOARD
Office of Research Protections
ASU Box 32068
Boone, NC 28608
828.262.2130
Web site: http://www.orsp.appstate.edu/protections/irb
Email: irb@appstate.edu
Federalwide Assurance (FWA) #00001076
IRB Reg. #0001458

To: Jason Copeland

CAMPUS MAIL

From: Dr. Stan Aeschleman, Institutional Review Board Chairperson
Date: 1/31/2013
RE: Notice of IRB Approval by Expedited Review (under 45 CFR 46.110)
Study #: 13-0163

Study Title: Increasing Sales by Managing the Interlocking Contingencies Between Sales Representatives and Customers Using Behavioral Self-Monitoring
Submission Type: Initial
Expedited Category: (7) Research on Group Characteristics or Behavior, or Surveys, Interviews, etc.,(5) Research Involving Pre-existing Data, or Materials To Be Collected Solely for Nonresearch Purposes
Approval Date: 1/31/2013
Expiration Date of Approval: 1/30/2014

This submission has been approved by the Institutional Review Board for the period indicated. It has been determined that the risk involved in this research is no more than minimal.

Investigator's Responsibilities:

Federal regulations require that all research be reviewed at least annually. It is the Principal Investigator's responsibility to request renewal of approval before the expiration date. You may not continue any research activity beyond the expiration date without IRB approval.

Any adverse event or unanticipated problem involving risks to subjects must be reported immediately to the IRB. You are required to obtain IRB approval for changes to any aspect of this study before they can be implemented except to eliminate apparent immediate hazards. Best wishes with your research!

CC:
Timothy Ludwig, Psychology

Appendix C

Research Assistants' Agreement of Confidentiality

This is an Agreement between _____ and US Buildings in which _____ agrees not to use, commercialize, or disclose any Confidential Information during or after his/her participation to any third party.

All information that has economic or commercial value to the company are considered as trade secrets. The trade secrets include but not limited to the verbal behaviors observed while listening to the archived sales calls.

The research assistant shall return to the Company all documents and property of the Company, including without limitation documents, models, source code, designs, flowcharts and listings, along with all copies made thereof, shall be returned upon termination of employment. The research assistant further agrees that they shall not retain copies, notes or abstracts of the foregoing.

_____ agrees not to record, copy, or store any information observed while assisting with data collection associated with this study. This includes, but is not limited to, customer's contact or credit card information observed over phone calls, and any information collected while visiting the company.

This Agreement is executed on January 14, 2013 and shall remain in full force and effect until the information included herein is no longer a trade secret or until Company sends seven day written notice releasing him/her from the obligations of this Agreement, whichever event occurs first.

Signature: _____ Researcher Signature: _____

Printed Name: _____ Printed Name: _____

Date: _____ Date: _____

Authorized Signature: _____

Printed Name: _____

Title: _____

Date: _____

Appendix D

Focus Group Meeting Protocol

- Introduce the researchers
- State that all of you agreed to participate
- We are recording this meeting for research purposes
- State that we are here to identify effective behaviors in closing sales
- Let's begin there
    - What do you believe are effective behaviors in closing sales?
    - We write these down on the white board
    - Then rank them
- Ask how often do you perform these behaviors? %?
    - Compare what they think they perform versus what we have observed
- Remind them that we have been listening and we have conducted statistical analysis
- Present to them the behaviors we found using statistical analysis
- Tell them that we will combine the behaviors found in this meeting with what we found in our statistical analysis to form a check sheet
- We will ask you to fill out check sheets for each sales call you do
- This will go on for 5 weeks (In a minute we will set some goals for each behavior)
- We will score these check sheets weekly for accuracy and performing these behaviors
- After 5 weeks, if you meet the goals of performance and accuracy, then you no longer have complete check sheets
- If you don't meet the goals, we will ask you to continue filling out check sheets and give you weekly individual feedback from the phone calls
    - When you reach the goals, then you can stop using the check sheet
    - In 6-8 weeks, we will report to the group your change and impact on sales and commission
- Have them set goals for each behavior

Appendix E

Sales Representative Performance

The following is the percentage of times you mentioned each item identified in the focus group meeting held on February 19th, 2013. In that meeting, you, as a group, decided on a goal of 40% for performing these behaviors during sales calls.

Each table below represents an item identified in that meeting. The "Your % Observed" column represents the percentage of times you performed the behavior as observed by our research assistants. The "Your Check Sheet" column represents the percentage of times you observed that you performed the behavior. The "Group % Observed" column represents the percentage of times that you, as a group, performed each behavior as observed by our research assistants. If I do not have at least 6 observations for you in a week, then your data for that week will not be shown below. Instead, it will be presented as "**%".

Ask for Customer's Email Address			
	Your % Observed	Your Check Sheet	Group % Observed
Pre-Meeting	**%	**%	**%
Week 1	**%	**%	**%
Week 2	**%	**%	**%
Week 3	**%	**%	**%
Week 4	**%	**%	**%

Ask Customer if They are Putting the Building up Soon.			
	Your % Observed	Your Check Sheet	Group % Observed
Pre-Meeting	**%	**%	**%
Week 1	**%	**%	**%
Week 2	**%	**%	**%
Week 3	**%	**%	**%
Week 4	**%	**%	**%

Ask Customer What They are Using the Building For.			
	Your % Observed	Your Check Sheet	Group % Observed
Pre-Meeting	**%	**%	**%
Week 1	**%	**%	**%
Week 2	**%	**%	**%
Week 3	**%	**%	**%
Week 4	**%	**%	**%

Ask Customer What Their Budget is.			
	Your % Observed	Your Check Sheet	Group % Observed
Pre-Meeting	**%	**%	**%
Week 1	**%	**%	**%
Week 2	**%	**%	**%
Week 3	**%	**%	**%
Week 4	**%	**%	**%

State What Warranty Come With Gauge of Frame.			
	Your % Observed	Your Check Sheet	Group % Observed
Pre-Meeting	**%	**%	**%
Week 1	**%	**%	**%
Week 2	**%	**%	**%
Week 3	**%	**%	**%
Week 4	**%	**%	**%

State Deposit Amount to Get Order Started.			
	Your % Observed	Your Check Sheet	Group % Observed
Pre-Meeting	**%	**%	**%
Week 1	**%	**%	**%
Week 2	**%	**%	**%
Week 3	**%	**%	**%
Week 4	**%	**%	**%

Number of Self-Observations Submitted		
Week	Individual	Average of Sales Reps
1		
2		
3		

Appendix F

Consent to Participate in Research

Information to Consider About this Research

Title: Increasing Sales by Managing Interlocking Contingencies Between Sales Representatives and Customers Using Behavioral Self-Monitoring

Principal Investigator: Jason Copeland
Department: Psychology
Contact Information: email: copelandje@appstate.edu; phone: 205 353-7456
Faculty Advisor: Dr. Timothy Ludwig
Contact Information: ludwigtd@appstate.edu

What is the purpose of this research?
By conducting this study we hope to identify effective verbal behaviors for selling steel buildings and earning incentive. Results of this study will be used in a student thesis. No identifying information from the company or participants will be used in the thesis.

Why am I being invited to take part in this research?
You are being invited to participate because you are one of 15 Sales Representatives working for US Buildings.

What will I be asked to do?

We are asking you to participate by allowing us to analyze your recorded phone conversations with customers and provide you with information about what we learned from these conversations.

We are then asking you to participate in a focus group to determine how to use this information to improve what you say and ask during the sales call. From your input, a list of behaviors will then be developed and given to you. Finally, we will ask you to try out the improvement and complete short checklists during or directly after the sales call. You will be asked to record your own behaviors during each call as well as the behaviors of your customers.

Recorded phone calls will be listened to by trained assistants who will record your first name and the occurrence of specific verbal behaviors (e.g., asking the customer what their budget it). No customer information will be recorded nor will your last name.

We believe this will increase your sales. However, if it is determined that this does not have an effect, we will provide you with visual feedback on your verbal behaviors every week.

At the conclusion of the study, we will ask you to fill out a social validity questionnaire to assess the degree you thought the intervention was effective and if it had an impact on your job satisfaction. The expected duration of participation is 5 weeks.

What are possible harms or discomforts that I might experience during the research?

We are not aware of any harm or discomfort you may experience.

What are possible benefits of this research?
By participating in this research, you may benefit by increasing the number of sales you close and commission made from those sales. Other companies and Sales Representatives may benefit from the data collected in this study.

Will I be paid for taking part in the research?
Because you will be participating as part of your normal work within your job, you will not be compensated for taking part in this study.

How will you keep my private information confidential?
The information we get from the recorded phone calls will be confidential. That means that no one in your company or outside of the research team, will have access to the data we record from of the phone calls. While we may give you your personal information from the phone calls, your work team will only get group-level summarized data that cannot be traced back to you.

Data from your archived phone conversations will be recorded by research assistants. The research assistant will pause the archived phone calls and look on a form that links the employee first name with an ID number. No last names will be in any file. These ID numbers will be used to identify all electronic databases and research reports. This linking form and resulting data will be stored on a pass-word protected computer.

During the course of the focus group discussions, you should not mention any personal or private, identifiable information (such as names) of individuals who are not participating in the focus group. In addition, by signing this consent, you agree that all conversations which take place in the focus group should not be discussed with anyone outside of the focus group and its participants. Because co-workers will be involved in the focus group and managers will assist in coordinating an appropriate time for the focus group, neither your anonymity nor confidentiality can be assured.

The owner of US Buildings has signed a document that states no negative employment decisions will be made based on our research. In other words, your participation in this study cannot be used against you in your work. We hope, instead, that it helps your work and your compensation at work. Management will not have access to the data collected directly from these phone calls, but will be given aggregated group data and anonymous individual data.

Whom can I contact if I have a question?
The people conducting this study will be available to answer any questions concerning this research, now or in the future. You may contact the Principal Investigator at 205 353-7456. If you have questions about your rights as someone taking part in research, contact the Appalachian Institutional Review Board Administrator at 828-262-2130 (Monday through Friday), through email at irb@appstate.edu or at Appalachian State University, Office of Research and Sponsored Programs, IRB Administrator, Boone, NC 28608.

Do I have to participate?

Your participation in this research is completely voluntary. If you choose not to volunteer, there is no penalty or consequence. If you decide to take part in the study you can still decide at any time that you no longer want to participate. You will not lose any benefits or rights you would normally have if you do not participate in the study.

This research project has been approved on January 31, 2013 by the Institutional Review Board (IRB) at Appalachian State University. This approval will expire on January 30, 2014 unless the IRB renews the approval of this research.

I have decided I want to take part in this research. What should I do now?

We will be contacting you within the next two weeks in order to conduct the focus group meeting.

If you have read this form, had the opportunity to ask questions about the research and received satisfactory answers, and want to participate, then sign the consent form and keep a copy for your records.

Participant's Name (PRINT) Signature Date

Vita

Jason Copeland was born in Birmingham, Alabama, to Jimmy and Jane Copeland. He graduated from the University of Alabama with a Bachelor of Science in Psychology. In the fall of 2011, Mr. Copeland entered Appalachian State University's Industrial/Organizational Psychology and Human Resource Management program. In August of 2013, he earned his Master of Arts.

Mr. Copeland's professional interests include Employee Training and Development and Organizational Development. He currently resides in Oneonta, Alabama.